

# **LOW INCOME OVERSIGHT BOARD MEETING (LIOB)**

**City of Santa Ana  
Council Chambers  
22 Civic Center Plaza  
Santa Ana, CA 92701  
1-866-642-1440  
7516937#**

**Wednesday, August 19th, 2015**

# Low Income Oversight Board (LIOB)

Wednesday, August 19, 2015

City of Santa Ana  
Council Chambers  
22 Civic Center Plaza  
Santa Ana, CA 92701  
9:30am – 3:30pm

[www.liob.org](http://www.liob.org)

Call - In Number 1-866-642-1440 - Passcode 7516937#

WebEx information:

Go to:

<https://van.webex.com/van/j.php?MTID=md12105efbf696331aace60f723ee7955>

Meeting Number: 741 456 132

Meeting Password: !Energy1

[9:30 a.m. – 9:35 a.m.]	1.	Welcome and Introductions— Robert Castañeda, LIOB Chair and Commissioner Catherine J.K. Sandoval (5 minutes) Standing Item <ul style="list-style-type: none"><li>• Introduction of Dan Rendler, Utility Representative - SoCalGas</li></ul>
[9:35 a.m. – 9:40 a.m.]	2.	Approval of the May 28, 2015 LIOB Meeting Minutes, Facilitated by Robert Castañeda, LIOB Chair (5 minutes) <i>Action Item</i>
[9:40 a.m. – 12:30 p.m.]	3.	Investor Owned Utilities Reports – Utility Representatives, followed by LIOB Questions <i>Standing /Action/Discussion Item</i>  Small and Multi-Jurisdictional Utilities (60 minutes) 9:40am -10:40am <b>Workshop in A.15-02-001</b> <ul style="list-style-type: none"><li>a) Successes and areas for improvement from last year’s program cycle to the next.</li><li>b) How the drought emergency is being incorporated into ESA programs, multi-family programs and measures, report on unspent funds and ideas regarding their potential use to improve program goal attainment.</li><li>c) Current Penetration Rates for CARE &amp; ESAP and % Budget</li><li>d) Report on CARE &amp; ESAP Marketing &amp; Outreach Efforts</li></ul> Large Utilities (60 minutes) 10:40am-11:40am <b>Workshop in A.14-11-007</b> <ul style="list-style-type: none"><li>e) Impacts of information from hearings and workshops on CARE ESA program administration; suggestions from exploration of draft water-energy nexus cost calculator, enhanced multi -family measures in light of Rate Reform Order that calls for use of the ESA program to assist high energy use low-income households</li><li>f) Discussion about unspent funds and ideas regarding their potential use to improve program goal attainment. Discussion of issues such as removing per measure caps, measures to address the water-energy nexus and drought emergency, and multi-family needs.</li><li>g) Current Penetration Rates for CARE &amp; ESAP and % Budget</li><li>h) Annual Report of the CARE &amp; ESAP Marketing &amp; Outreach Efforts including Ethnic and Ethnic Owned (<i>Annual Standing Item</i>)</li></ul> 11:40am-12:30pm (50 minutes) Continuation of Workshops in A.15-02-001 and A.14-11-007 <ul style="list-style-type: none"><li>i) Party and Public Comment on the IOU Reports</li></ul> <b>End of Workshop</b>

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[12:30 p.m. – 12:45 p.m.]	4.	Overview of CSE's Program – Center for Sustainable Energy, Sachu Constantine, Director of Policy (15 minutes) <i>Informational Item</i>
[12:45 p.m. – 12:55 p.m.]	5.	Legislative Update – CPUC- Office of Governmental Affairs – (10 minutes) <i>Informational/Standing Item</i>
[12:55 p.m. – 1:55 p.m.]		Lunch (60 minutes)
[1:55 p.m. – 2:05 p.m.]	6.	Public Comments— Facilitated by Robert Castañeda, LIOB Chair (10 minutes) <i>Informational/Standing item</i>
[2:05 p.m. – 2:20 p.m.]	7.	Highlights of Upcoming Activities for Low-Income Energy Programs – Energy Division Staff (15 minutes) <i>Standing Item</i> Update: Low Income Needs Assessment
[2:20 p.m. – 2:40 p.m.]	8.	Lifeline Telephone Program Update – Anna Jew, CPUC -Consumer Programs – Communications Division (20 minutes) <i>Informational/Standing Item</i> a) Lifeline Proceeding Update ( <i>Standing Item</i> ) b) Update on Lifeline Direct Application Project c) Tribal Lifeline Update 1. Allocation of Funds 2. Process for Carriers Offering Tribal Lifeline Program
[2:40 p.m. – 3:00 p.m.]	9.	Water Utilities' Current Issues – Rami Kahlon – Director, Division of Water and Audits (20 minutes) <i>Update/Informational/Standing Item</i>
[3:00 p.m. – 3:05 p.m.]	10.	New Assignments and Approval of the LIOB Subcommittees (5 minutes) <i>Action/Discussion Item</i>
[3:05 p.m. – 3:25 p.m.]	11.	Subcommittee Reports and Updates – Facilitated by Robert Castañeda, LIOB Chair (20 minutes) <i>Standing /Action/Discussion Item</i> a) <i>Marketing &amp; Outreach</i> (Board Members Toledo, Gross, Watts & Delgado-Olson) b) <i>ESAP and CARE Implementation</i> (Board Members Castaneda, Wimbley, Watts & Lopez) c) <i>Workforce Education and Training</i> (Board Members Hernandez & Castaneda) d) <i>Water Industry</i> (Board Members Stephenson, Lopez and Castaneda) e) <i>Emerging Issues/Climate Change</i> (Board Members Toledo & Delgado-Olson) f) <i>AB 327 Subcommittee</i> (Board Members Hernandez, Lopez, &Wimbley)

# Low Income Oversight Board (LIOB)

Wednesday, August 19, 2015

City of Santa Ana  
Council Chambers  
22 Civic Center Plaza  
Santa Ana, CA 92701

[3:25 p.m. - 3:30 p.m.]

- Future Meetings Dates & Agenda Items for Future Meeting (5 minutes)  
*Discussion Item*

Thursday, October 29<sup>th</sup>, 2015  
10:00am - 4:00pm  
Seaside City Hall  
Council Chambers  
440 Harcourt Ave  
Seaside, CA 93955

This is a public meeting. The meeting is accessible to the physical disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting may make a request by contacting Zaida Amaya at (916) 928-4702 or sending a written request to 180 Promenade Circle, Suite 115, Sacramento, CA 95834. Providing your request at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

Interested parties may attend in person or via teleconference. Notice of the Low Income Oversight Board meeting / workshop can be accessed at: <http://www.cpuc.ca.gov/PUC/energy/Low+Income/>

#### **Teleconference and WebEX Information:**

**Phone Line:** 1-866-642-1440- **Participant Code:** 7516937#

#### **WebEx information:**

**Go to:**

<https://van.webex.com/van/j.php?MTID=md12105efbf696331aace60f723ee7955>

**Meeting Number:** 741 456 132

**Meeting Password:**!Energy1

All times indicated and the order of business is approximate and subject to change.

This meeting / workshop notice is being sent to all parties on the service lists of Applications A.14-11-007, A.14-11-009, A.14-11-010 and A.14-11-011; and A.15-02-001, A.15-02-002, A.15-02-003, A.15-02-013, A.15-02-024 and A.15-03-004, And solely for the purposes of Commission's Ex Parte Communication Requirements, this notice will be deemed a functional equivalent of the notice pursuant to Commission's Rules of Practice and Procedure, Rule 8.3 (c)(1) for the proceedings A.14-11-007, A.14-11-009, A.14-11-010 and A.14-11-011; and A.15-02-001, A.15-02-002, A.15-02-003, A.15-02-013, A.15-02-024 and A.15-03-004

Please note: the CPUC will be limiting the amount of meeting packages provided at the LIOB meetings in an effort to conserve paper and curtail printing expenses.

*Welcome and Introductions*

# LIOB MEMBERS

## **Robert Castaneda**

**LIOB Chair**  
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Public Member Position

## **Patricia Watts**

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## **Catherine J.K. Sandoval** **Commissioner**

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Commissioner

## **Ortensia Lopez**

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Public Member Position

## **Jason Wimbley**

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California Department of Community Services and  
Development Appointee

## **Jose Atilio Hernandez**

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Public Member Position

## **Dave Stephenson**

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Water Corporation Representative

## **Charlie Toledo**

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## **Larry Gross**

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Public Member Position

## **Benito Delgado-Olson**

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Governor Appointee

## **Daniel J. Rendler**

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Electrical/Gas Corporation Representative

\* Per Article Six of the LIOB Charter, Officers shall serve a one year term.

*Approval of the May 28<sup>th</sup>, 2015  
LIOB Meeting Minutes*

# LOW INCOME OVERSIGHT BOARD (LIOB)

Thursday, May 28, 2015

Sacramento New City Hall

915 I Street

First Floor - Council Chambers

Sacramento, CA 95814

[www.liob.org](http://www.liob.org)

Call - In Number 1-866-630-5989 - Passcode 3362110#

Meeting called to order at 9:32am by Chairman Hernandez

## LIOB Board Members Present:

Jose Atilio Hernandez, Commissioner Catherine J.K. Sandoval, Ortensia Lopez, Dave Stephenson, Jason Wimbley, Maril Pitcock, Charlie Toledo, Robert Castaneda and Benito Delgado-Olson (quorum present)

LIOB Members Absent: Patricia Watts and Larry Gross

## California Public Utilities Commission (CPUC) Staff Present:

Joanna Gubman, Rami Kahlon, Lisa Paulo, Tory Francisco, Nick Zanjani, Bill Johnston Jr., Amy Baker, Jamie Ormond, Anna Jew, Jonathan Lakritz and Zaida Amaya

## Public Present:

Mary O'Drain, Patti Landry, Russ Garwacki, Warren Doty, Roberto DelReal, Rosie Casillas, Philip Quadrini, Kristin Jacobson, Lynda Timbers, Arleen Novotney, Allan Rago, Joy Yamagata, Robin Enkey, David Donahue, Belinda McMillan-Haener, Christine Mailloux, Ana Montes, Yvette Vasquez, Sandra Williams, Kelly Prasser, Anna Solorio, Ron Garcia and Cynthia Austin

## Participants via Conference:

1. Welcome and Introductions— Jose Hernandez, LIOB Chair and Commissioner Catherine J.K. Sandoval (5 minutes) *Standing Item*  
Announcement of Mr. Benito Delgado-Olson, Governor's New Appointee to the LIOB

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Board Member Hernandez welcomed everyone to the Low Income Oversight Board Meeting. Next, it was announced that Board Member Pitcock's term has concluded as the LIOB utility representative. Mr. Dan Rendler of SoCalGas will be the new LIOB utility representative, effective August 19<sup>th</sup>, 2015. The Board thanked Ms. Pitcock for her invaluable and instrumental participation as the LIOB's utility representative.

Commissioner Sandoval announced the recent appointment by Governor Brown of Mr. Benito Delgado-Olson to the LIOB. Mr. Delgado-Olson has been the executive director at [K to College](http://KtoCollege.org) since 2009. He is a member of the University of California, Berkeley Cal Alumni Association and Californians Dedicated to Education Foundation. The Board welcomed Mr. Delgado-Olson to the LIOB; and looks forward to his expertise and collaboration with low income community needs. Mr. Delgado-Olson thanked the Board for the warm welcome and looks forward to working with the Board and learning more about the Board's mission.

2. Election of LIOB Chair – Facilitated Chairman Hernandez (5 minutes) *Action Item*

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The Board opened the nomination for the LIOB Chair position, as specified in Resolution E-4095, Article 6, 6.1. Board Member Wimbley nominated Board Member Castaneda as the Chairman of the LIOB. A motion was made by Board Member Wimbley to appoint Board Member Castaneda as the new LIOB Chair. The motion seconded by Board Member Stephenson (Yes; Members Lopez, Stephenson, Toledo, Wimbley, Pitcock, Delgado-Olson and Pitcock; Abstained; Board Member Castaneda; motion passed) The Board congratulated Board member Castaneda on being elected as the new chair. The Board thanked Board member Hernandez for his long service and for his leadership as the LIOB chair.

3. Public Comments— Facilitated by Jose Hernandez, LIOB Chair (15 minutes) *Informational/Standing item*

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The Board announced that public comments will be open following the presentation in item 7c.  
Upcoming CARE Rate Impacts - due to recent PD in Rates Proceeding & AB 327 mandates

Ms. Anna Solorio from Community Housing Opportunities Corporation (CHOC)-Energy Efficiency Council (EEC) provided comments on the proposed Energy Savings Assistance Program II. As an ESA contractor her organization is responsible for dispatching assessors to assess and qualify potential households for the ESA program. She stressed that the assessors that are hired are local people from the community, who can culturally relate to their clients and address them in way that they are able understand. The weatherization crew that is often with the assessors returns to install the weatherization measures, such as CFL's, weather stripping, water saving measures etc. Ms. Solorio mentioned that it is becoming increasingly difficult to identify homes that have not been treated prior to 2001. The CPUC established a benchmark to reach all feasible homes by 2020, made an aggressive timeline, and set limitations regarding whether and when homes could be re-treated. In previous years, there has been an 8 year go-back rule, however, measures such as weather stripping disintegrates. She added that there is new technology; and new energy savings measures that could be introduced, such as power strips that were not around 8 years ago. Ms. Solorio added that if ESA II is not adopted, it will be 14-16 years before a home can be retreated. This is an important benefit for low income households. There is a vibrant workforce in this network of contractors and if there is no change in the go-back rule, there will be massive lay-offs. Ms. Solorio appreciates the Board's support on this issue.

Commissioner Sandoval encourages the filing of these comments in the CARE/ESA proceeding. The Commission has launched the CARE/ESA proceeding and hearings have been scheduled. Questions on the proceeding or on how to file comments or to become a party in a proceeding, contact Jamie Ormond at [Jamie.ormond@cpuc.ca.gov](mailto:Jamie.ormond@cpuc.ca.gov). A brochure that explains How to Become a Party in a CPUC Proceeding can be downloaded at:

<http://www.cpuc.ca.gov/NR/rdonlyres/191B1061-FFB2-4203-9B63-A07156EAC899/0/4HowtoBecomeaPartyinaCPUCProceedingFinal020614.pdf>

Via Conference (name inaudible) provided comments on their strong support of Interstate Renewable Energy Council's (IREC) cleanCARE proposal to potentially bring Solar to CARE customers. She added that there is interest in this area, and this is an issue that needs to be flagged in solar communities with respect to NET metering for CARE customers. She also commented that it is important to coordinate closely with the Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables (ECR) programs and if possible to ensure alignment because this particular program by law (SB 43) does not allow cost shifting other than the subsidy available for CARE customers. As a result, there is no cost shifting to non-CARE ratepayers in IREC's cleanCARE proposal.

4. Approval of the February 19, 2015 LIOB Meeting Minutes, Facilitated by Jose Hernandez, LIOB Chair  
*Action Item*

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A motion was made to approve February 19, 2015. The motion was moved by Board Member Castaneda and seconded by Board Member Toledo (Yes; Commissioner Sandoval; Members Lopez, Stephenson, Toledo, Wimbley, Pitcock, Delgado-Olson and Pitcock; motion passed; abstained; Hernandez)

5. Water Utilities' Current Issues – (60 minutes) *Update/Informational/Standing Item*  
a) Fran Spivy-Weber, Vice Chair, State Water Resources Control Board

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Ms. Tam M. Doduc, a member of the State Water Resources Control Board, discussed the recent drought activities, noting the Governor's 25% mandated water conservation throughout the state. The State Water Board adopted emergency regulations on May 5, 2015; and subsequently the Commission acted on May 7, 2015, and ordered the water IOU's to comply with these regulations. Ms. Doduc added that although this is a very aggressive approach, the Board believes that it is the most effective way to accomplish short term conservation water savings during the drought. It is projected that approximate savings of 1.2 -1.5 million acre-feet will be saved in the next 9 months. These regulations have been approved by the Office of Administrative Law and will be in effect from June 1, 2015 through February of 2016. Ms. Doduc mentioned that the Board has not yet tackled Provision 8 in the Governor's Executive Order regarding conservation pricing. She stated that studies show that this is an effective tool, in terms of water conservation, both in the short term as well as the long term. However, the local water agencies are constrained by Proposition 218, which requires voter approval of various taxes and user fees. The Board has been meeting with the agencies at the local level to brainstorm ideas. The State Water Board will be holding a workshop on July 7, 2015 to solicit and discuss ideas and begin a collaborative discussion.

Ms. Doduc also discussed the Human Water Rights Law, which the Governor signed into law in 2012 and added that California became the first State in the Nation to recognize the human right to safe, clean, affordable and accessible water. The Board has been doing their best to expedite the transfer of water between those who have water, to areas and entities that are in a dire need of these transfers, especially for domestic uses. The Board is also looking at temporary changes to various water rights permits. In addition, the Board is working to develop regulations regarding reporting of diversion and uses of water, which is also ordered in the Governors' Executive Order. The State Water Board took action to curtail junior water right holders from diverting under certain conditions, and the Board expects that they will need to look at curtailing the more senior water right holders, including pre 1914 as well as riparian. The executive officer approved a proposal for some of the Delta riparian water right holders to participate in a voluntary 25% reduction effort, which compares to a 2013 level.

Ms. Doduc also reported that the Board is tracking over \$16 million dollars in various projects that are being funded through grants or loans, and for emergency drought efforts. At the last State Water Resources Control Board meeting, the Board approved guidelines for other \$19 million dollars, to help disadvantage communities. Ms. Doduc also reported that the State Water Board has adopted Guidelines for the Drought Response Outreach Program for Schools (DROPS). DROPS is focused on projects that reduce storm water pollution and provide multiple benefits including water conservation, water supply augmentation, energy savings, increased awareness of water resource sustainability, and reduced dry weather runoff.

The Board asked for an update on Porterville. Ms. Dudac mentioned that the Board has been focusing on providing emergency drinking water and that the Deputy Director has been working with the communities to provide bottled as well as other type of emergency drinking services. This is an on-going process and the Board aims to provide the necessary assistance.

Ms. Doduc mentioned that the pricing discussion is a topic that needs to be addressed, and added that the main goal of the conservation regulations was intended to reduce landscape irrigation. The Board recognizes that there are a lot of challenges that need to be addressed and the Board needs to determine the best way to achieve the conservation mandate without negatively impacting disadvantaged communities that would impact their health and safety needs.

Board Member Stephenson mentioned that the issue of evaporative coolers has been a topic of concern, as a very high percentage of evaporative coolers are used in the Valley area as a cooling source. He also asked how the Board plans to look at longevity of water supply and sustainability and replicate what is being done today in future situations.

Ms. Doduc mentioned that there has been a lot of input and discussion of various factors including evaporation and recycled water use, as well as other types of water supply in terms of conservation measures that have already been implemented in various areas, and they will continue to be part of this dialogue. As far as efforts for future plans, she commented that the Board is not solely responsible for this effort; however, there is a tremendous amount of effort occurring through the WETCAT effort, (Water Energy of the Climate Action Team) and added that there ongoing discussion throughout the drought task force as well as collaboration with the Department of Water Resources, the Energy Commission, the CPUC and other agencies. She also discussed the level of engagement and improvement in communication with other entities at the State, Local and Federal levels.

Board Member Castaneda commented that community colleges or workforce education and training institutions would greatly benefit from a curriculum. He strongly encouraged the Board to consider developing a curriculum for graywater systems, as this could have great impact on businesses involved in terms of technologies in connection with actual contracting opportunities, training and certification in academia and vocational environments.

Ms. Doduc informed the Board that there is Legislation that mandates environmental education as part of the k-12 core curriculum. Ms. Doduc thanked Board Member Castaneda for his suggestions and will consider the recommendations as part of the DROPS programs.

Board Member Toledo asked if there was any action against fracking.

Ms. Doduc stated that the primacy over this operation is with the Department of Conservation, Division of Oil, Gas & Geothermal Resources (DOGGR) and that SB4 directed the State Water Board to develop ground water monitoring criteria as well as regional ground water monitoring program associated with this activity. Although the primacy is with DOGGR, the Board is very engaged in ensuring that this activity does not threaten the ground water supply.

Commissioner Sandoval thanked Board Member Doduc for taking the time to present before the LIOB, and looks forward to continued discussions and collaboration with the State Water Resources Control Board.

Rami Kahlon, Director of Division of Water and Audits, provided a recap on the April 1, 2015 Executive Order by Governor Brown that called for a 25% reduction in potable urban water use and on May 5, 2015, the State Water Resources Control Board, adopted [Resolution No 2015-0032](#), adopting emergency regulations and targeting reductions for the top 410 water agencies. On May 7, 2015, the CPUC adopted Resolution [W-5041](#), which ordered compliance with State Board Executive Order and ordered the regulated utilities to implement mandatory rationing. Mr. Kahlon reported that most of the Class A & B water utilities have submitted proposals and most of the utilities' proposals for low-income customers include a 50% reduction on any surcharges or penalties. Water and Audits Division is carefully looking at the impact and trying to ensure some uniformity across all the schedules and the utilities. Mr. Kahlon also shared with the Board the Utility Cost Mapping Project, which provides a [comparative analysis of utility services & rates in California](#). The goal was to assess the impact of utility bills on low-income households, areas of need of rate relief, conservation outreach and efficiency measures. The interactive map provides specific details by zip code and identifies the average bill customers are paying, broadband speeds, and identifies where low-income customers are located. In response to Board member Toledo's inquiry about a prolonged drought, Mr. Kahlon shared a research study by a number of professors, title [Economic consequences of optimized water management for a prolonged, severe drought in California](#). The study found that California has experienced 2 prolonged droughts lasting 120-200 over the past several thousand years. The study synthesized a 72 year drought using dry year records and assumed that the hydrological inflows into the Delta and rivers are just going to be about 53%, they excluded exceptionally wet years and wanted to see the economic effects in the potential adaptation of California in the year 2020. The result of the study found that the current water system infrastructure is adaptable for a severe prolonged drought, that water markets will enable water supply system with no significant catastrophic disruption. The study found that agriculture and the environment will suffer and requires institutional flexibility and use of water markets and other allocation methods.

Commissioner Sandoval, thanked Mr. Kahlon for his extraordinary job in both representing the CPUC on the task force and for his quick and effective coordination to get two resolutions relevant to water conservation in very short order. Commissioner Sandoval encouraged the Board members to be ambassadors for getting out the message on conservation.

**6. Legislative Update – Nick Zanjani - CPUC- Office of Governmental Affairs – (10 minutes)**  
**Informational/Standing Item**

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Mr. Nick Zanjani of the Office of Governmental Affairs (OGA) provided an update on the recent low income legislation. Mr. Zanjani informed the Board that the Legislature is currently in the process of clearing the suspense file. All of the federal bills over \$100,000 of Federal fund impact or \$150,000 of special fund impact are placed on the suspense file. At this moment, both houses are clearing their suspense files to see what Bills will move to the second house for continued consideration. Mr. Zanjani's report included a brief on AB 88 (Gomez); AB 401 (Dodd); AB 615 (Rendon); AB 1330 (Bloom); AB 1503 (Perea); SB 350 (DeLeon) and SB 471 (Pavley). Mr. Zanjani also provided a handout to the Board on the CEC Water Energy Nexus. Mr. Zanjani mentioned that the Commission does not have intentions of taking a position on SB 88, since this is a more of a tax bill rather than a policy bill. Mr. Zanjani thanked the Board for the opportunity to present to the Board and indicated he would continue to monitor low-income related bills and will report back at the next LIOB meeting.

7. **Utilities' Reports— Utility Representative (40 minutes)**

*Standing /Action/Discussion Item*

a) **Current Penetration Rates for CARE & ESAP and % Budget Spent**

Board Member Pitcock presented the current penetration rates for CARE and ESAP as well as the % budget spent. These numbers are also presented in the monthly low income reports filed by the utilities.

Mr. Andrew Steinberg clarified that the number presented represent the first quarter. The most recent numbers are higher and show an increase in participation with 13% as of the end of April. In addition, Mr. Steinberg added that SCG is taking additional activities that they are undertaking which will ramp-up the participation throughout the year. Mr. Steinberg reported that SCG has been working with The Housing Authority of the City of Los Angeles (HACLA). SCG has also implemented a data sharing tool with Edison, the numbers and benefits of this system will accrue and will be reflected in the numbers later in the year. SCG is also doing additional initiatives with door hangers in different languages.

Board Member Hernandez requested for the utilities to present a side comparison relative to the previous 2 years for both the ESA and CARE programs. Mr. Steinberg noted that the IOU's are seeing a trailing participation in the program as they are getting closer to 2020. The IOU's are trying to identify and serve the harder to reach customers.

Ms. Sandra Williams of SDG&E informed the Board that SDG&E is on track and that they have over 6,000 customers that are being enrolled, but have not been billed yet. SDG&E finished at 108% of goal in 2014.

Mr. Roberto DelReal of SCE clarified that their enrolled customer numbers are higher than the 11% treated homes numbers, and that a lot of the customers that they enrolled may not meet the 3 measurement minimum, therefore, they can't report them as treated.

b) **2015 Cool Center Readiness – (Electric IOU's)**

- Approximate number of centers in service territory
- Plans to promote cooling center awareness

Ms. Rosie Casillas of SCE provided an overview on their cool center and cool zone program. SCE partners with Local government administrators of county cool centers in lieu of contracting with individual centers. There are over 200+ locations across Los Angeles, San Bernardino, Riverside, Tulare, and Kern counties. A list of Cool Centers is available by calling SCE Customer Contact Center, visiting [www.sce.com/coolcenter](http://www.sce.com/coolcenter) or calling 211 or visiting county 211 websites.

Ms. Mary O'Drain of PG&E reported that PG&E provides financial and informational support to 9 local government organizations, operating approximately 55 cool centers. Cool Centers consist of: libraries, senior centers, community centers, recreation centers, pools. Cool Center partners are City of Sanger, City of Fresno PARCS, City of Fowler, Kern County, City of Arvin, Merced County OES, City of Madera, City of San Jose, and Contra Costa County Area Agency on Aging. Cool centers are generally open from late-May through mid-October, on days when temperatures forecasted by the National Weather Service (NWS) exceed triggered temperatures for an area(s). PG&E conducts outreach efforts thru bill Insert, Cooling Center brochure and Breathe Easy Solutions brochure, PG&E's Cool Center toll-free line at 1-877-474-3266, PG&E's Cool Center website [www.pge.com/coolingcenter](http://www.pge.com/coolingcenter), and other outreach methods.

Kelly Prasser of SDG&E reported that this is a partnership with County of San Diego's department of Aging & Independence Services, which they administer. County Champion Supervisor Diane Jacobs has been leading this program for about 13 years. SDG&E has 117 participating locations, largely libraries, senior centers, community centers, recreation & visitors centers, County's involvement includes, Fielding calls, directing to Cool Zones, Distributing portable fans & program materials, Messaging at County outreach events and hosting community kick-off event in June. SDG&E efforts also include enrollment day events at Cool Zone locations, You Tube video with County and Energy Solutions Partner Network messaging: e-blasts, social media postings.

Public transportation is not part of the program; the utilities do not provide or subsidize public transportation; however, portable fans are provided for those who are not able to visit a cool center.

Commission Sandoval suggested that transportation subsidy might be an issue to revisit, this was an issue that has been discussed before, and previous conclusion was that the attendance was relatively low at cool centers.

c) Upcoming CARE Rate Impacts - due to recent PD in Rates Proceeding & AB 327 mandates

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SCE provided a summary of the ALJ's proposed decision (PD) issued April 21, 2015. The PD sets up a transition period in summer 2015, ending in 2019, to gradually reduce the current, 4-tiered structure to a 2-tiered structure with a lower differential. This PD also adopts an increase in the current minimum bills amounts beginning in 2015 to \$10 (non-CARE) and \$5 (CARE). It also orders default residential time of use (TOU) rates beginning in 2019, to follow opt-in TOU pilot beginning in 2016 and abbreviated default TOU pilot beginning in 2018. SCE reported on the bill impacts & impacts on affordability, highlighting that bill increases for lower-usage CARE customers will average about \$2 per month for each year of the PD's four-year glide path, not including the return of the California Climate Credit.

PG&E's provided a summary of their bill impacts due to the PD. PG&E noted that even after combining the proposed \$5 (CARE) and \$10 (non-CARE) customer charges with 2.1% annual revenue requirement increases, most CARE customers would see an average bill increase of no more than \$2.50 per month and most non-CARE customers would see an average bill increase of no more than \$5.00 per month each year. Because PG&E's CARE discount of 39.5% is already well below PG&E's proposed target of 43.3% 2015 and just under its target for 2016, PG&E will leave CARE rates at the levels adopted by the PD unchanged for the remainder of 2015. PG&E also noted that CARE Tier 1 and 2 customers' rates have decreased by more 33% in real terms over the past 22 years.

Board Member Castaneda commented that the average household size in rural areas is almost twice as large as in urban areas and that clearly this is an impact, and that it is important for this Board to understand the role the Board plays in connection with AB 327.

Lastly, PG&E mentioned that they are committed to using a combination of general awareness and direct outreach to customers, and direct outreach will be made to CARE and non-CARE most impacted customers. PG&E will leverage direct outreach tactics as well as additional approaches, including but not limited to email, direct mail, direct calls, dedicated phone-line with in-language support, local office events and support, dedicated events, participation in local community events, and CBO coordination and education.

SDG&E reported that the PD currently grants SDG&E a tier transition path by July of 2015, this transition shrinks the difference between the top and bottom tier from today's 133% to 20% by 2019. Currently, SDG&E's CARE rates provide a higher effective discount for upper tiers and a lower effective discount to

lower tiers due to rate subsidies in addition to the 20% line item discount and exemptions to CSI, DWR-BC and CARE surcharge. By removing these rate subsidies into a line item discount, usage at all tiers will now receive a more comparable level of discount. SDG&E's CARE Discount Transition Path is current: 40% - 2015: 38% (upon implementation of PD) - 2016: 36% and 2017: 34%. Under the PD the average customer with a 200kWh bill will not see a significant change \$22-\$23 bill; in 2017 the bill would be around \$31.57. For higher use customers at 700kWh the average bill is \$104 if the PD goes into effect, it increases to \$116 and \$130 in 2016. SDG&E emphasize that low income does not equate to low usage and that 38% of their customers are in Tier 3&4 more than 6 months of the year.

Next Steps: The PD establishes a Phase 3 which will address three areas

1. Interpretation of the Section 745 conditions that must be met for default TOU.
2. Develop requirements for supporting information and documentation for the Residential RDW applications.
3. Further CARE program restructuring.

Pre-hearing conference will be scheduled during the summer of 2015.

The Board opened the floor for public comment

Ms. Stephanie Chen from Greenlining Institute informed the Board that besides the provisions in AB327, requiring that special attention be paid to low income customers; there are also provisions on the Public Utilities Code that have existed long before AB327 was voted in. Ms. Chen commented that one of the major issues that Greenlining Institute and the Center for Accessible Technology (CforAT) had with the PD, is that it didn't taken into account the need to protect affordability for low-income customers. Ms. Chen stated that the vast majority of bills for low income customer will go up every year and that these increases are significant and should not to be taken lightly. She commented the PD is based on the notion that low usage customers and low income customers are not paying their fair share, and that they need to pay more. The alternate PD is based on the notion that prices should encourage conservation, good environmental stewardship and that it should protect consumers, both low income and not. Ms. Chen also addressed the question of what should be done with high user's households that are low income, and added that the answer is not through rate design, but rather through energy efficiency, net metering, demand response, and through all of the technologies that are available. She added that higher income folks are benefiting from these technologies and that low income people would like to also participate in these technologies. Lastly, Ms. Chen noted that fair prices should be set for everyone and conservation, energy efficiency, rooftop solar, and other green technology should be encouraged.

Anna Montes from The Utility Reform Network (TURN) commented that the current proposed decision negatively impacts all CARE customers and that by increasing the base line rate and adopting a 2 tier system raises monthly bills for CARE customers. She noted that many low income customers cannot afford the \$2-\$3 monthly increases. In the PD 75%-80% of non-CARE customers will receive increases and high energy users will get a lower bill. For PG&E's CARE customers, the Alternate PD, is reduced from 43% in 2015 to 35% by 2020, however, under the PD the reduction of 35% would be achieved by 2018. For SCG the CARE discount would increase from 32% to 35% by 2020. For SCE, the discount would remain at current levels of 32% and for SDG&E the CARE discount would be reduced from 38% in 2015 to 35% by 2020. The FERA discount would be changed to provide a 20% discount on tier 2 usage, and this would impact families. Under the Alternate PD there are no fixed charges for CARE customers, however, in the PD the IOU's proposed new fixed charges for implementation in 2019, and a fixed rate would raise bills for a large number of low to moderate usage CARE customers. Ms. Montes clarified that raising baseline rates does not specifically help the Central Valley because average summer usage is higher in Central Valley than it is in the San Francisco area.

Mr. Mike Campbell from ORA clarified that the comments from SCE about how the GHG climate credit offsets the benefits is something that is not supposed to be considered, and that this is a very different issue. He informed the Board that the Commission has looked at this issue very carefully and wants to make sure that that is not part of any price signal, but rather offsetting the cost of California's greenhouse gas program, and that is why it is done in two lump sum payments and not rolled in the rates. This issue has been delegated extensively at the Commission and the Commission has come up with the appropriate solution and it is not considered as off setting rates. SCE also spoke about how the rate change and looking at the rates further out from 2016-2017. Mr. Campbell also noted that as of now, they don't have the ability to compare the Alternate PD and the PD quite yet and that the utilities will provide their rate analysis for the Alternate PD later today. The numbers that were presented for the PD include zero revenue requirement increase for 2016 and this is very unlikely. ORA has prepared analysis to look at hot climate zones, and it compared last summer to this summer and the analysis showed that for PG&E CARE customers in Tier 1 & 2 and towards the top end of these tiers, monthly increases were about \$9.00 to \$11.00 compared to last summer. ORA believes that it is important to look at cumulative effects. As previously noted, the Commission is looking at rate design, which means there will be winners and losers and that the as tiers flatten each year, the lower usage customers are going to see bigger and bigger increases.

Board Member Castaneda commented that there is a lot of information out there, but would like the board to have a more interactive and robust website.

Board Member Delgado-Olson concurred and commented that the LIOB website is very good about updating materials, agendas, attachments; however, he would like to see more engagement and public participation. Board Member Delgado-Olson will work with staff and discuss ideas on how to improve the LIOB website.

- 8. Energy Division Reports and Updates (15 minutes)
  - a) Highlights of Upcoming Activities for Low-Income Energy Programs - *Standing Item*
  - b) Update on the Low Income Needs Assessment - *Informational/Discussion Item*

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Ms. Lisa Paulo of Energy Division provided an update on the Low-Income Needs Assessment (LINA) mandated in AB 327. Ms. Paulo explained that the LINA looks at the overall needs of the low income population in the State and tries to identify ways that the CARE and ESAP programs can be more responsive to those needs. The LINA will evaluate low-income program implementation and the effectiveness of weatherization services and energy efficiency measures in low-income households. Ms. Paulo informed the Board that the last LINA report was done in 2013 and consequently, the next report will be due in 2016. The LINA has established the LINA study group, which comprises of Ms. Paulo from ED and the utility representative. The contract will be managed by SCE in terms of the administrative management of the contract, but Energy Division is responsible for the direction oversight of the study and ensuring that all appropriate issues are included. A well-attended workshop was held on May 13, 2015 at the Pacific Energy Center. The Statutory deadline for the final report is December 2016. AB 327 requires the assistance of the Low Income Oversight Board in order to meet the objectives of the assessment. Board Members Castaneda and Lopez will assist in the LINA project.

9. Lifeline Telephone Program Update (25 minutes) – Anna Jew, CPUC -Consumer Programs – Communications Division - *Informational/Standing Item*

- a) Lifeline Proceeding Update
  - b) Update on Lifeline Direct Application Project
- 

Ms. Jew presented on Lifeline, and reported that there are 10 approved CA Lifeline wireless providers, and as of May 13, 2015, there are 10 pending wireless carriers requesting to become CA Lifeline and 4 pending for Federal Lifeline. Recently Sage Telecom was approved as a Federal Lifeline provider. She also noted that Cricket filed to drop out of Federal Lifeline Program. As of the end of April 2015 there is a combined 1.9 million participants in the CA Lifeline and/or Federal Lifeline with 1.1 being wireless. Ms. Jew's report shows that Lifeline wireline participants are steadily declining and that the CA Lifeline wireless is rapidly increasing. The combined CA Lifeline wireline and wireless participation rate currently is about 63% of the eligible participants.

In response to Board Member Toledo's request Ms. Jew provided a report on the current status of both Tribal and non-Tribal customers.

Board Member Toledo commented that the numbers are very discouraging and commented that the registration process for Native Americans on Tribal Lands is almost impossible and that the carriers are not even aware of the Enhanced Lifeline. Board Member Toledo expressed her dismay and asked why there are less than 100 participants in a program that has been in existence for about seven years. A representative from Xerox explained that the January 2014 denials were due to the fact that some of the new wireless carriers were not authorized to offer Lifeline in the Tribal areas. The total number of people registered on Enhanced Lifeline for the State of CA is 154.

Board Member Toledo commented that obviously this number speaks for itself and that this program is not working in any way. Board Member Toledo asked for a report to show what type of funding is being put into this program and how much money was spent to access those 154 customers over the last 7 years; she also added that there needs to be some accountability for this program. She mentioned that this is something that she has personally been working on for over 5 years without any success.

Board member Delgado-Olson asked if there was an existing or potential outreach mechanism to ensure that folks who are in these various regions of the state and are applying for these services with a provider that can provide the service that they are applying for

Jonathan Lakritz, Manager of the CA Lifeline commented that the Commission has established procedures, by which carriers can choose to participate to offer service in Tribal. At the time that these denials occurred, the carriers had not asked for authority to offer services in Tribal lands. The denials were not as a result of the subscriber's eligibility. Customers can go to our website to see which carriers are offering service in various parts by entering their zip code and that will give them a list of carriers that are eligible to offer services in that area. Mr. Lakritz also mentioned that in the past, the Commission has had outreach efforts in Tribal areas, however, there has not been any recent outreach efforts done. Mr. Lakritz agreed that the numbers indicate that there is vast room for improvement in this area and looks forward to working with the Board on recommendations on how to do that.

Mr. Donahue commented that most of the carriers are filing advice letters to provide services to Tribal areas.

Commissioner Sandoval suggested looking at the process for filing and the barriers that might exist for carriers that may want to update their filing and serve in those areas.

c) Report of the LifeLine Carriers on the Marketing & Outreach Efforts including Ethnic and Ethnic Owned Mr. Frank DelCol from TruConnect; Mr. David Donahue from Budget Mobile; and Ms. Grace Boehm from Assurance Wireless provided a report on their current marketing strategies

The Board thanked TruConnect, Budget Mobile and Assurance Wireless for their presentation on their marketing strategies and requested for these reports on an annual basis and for the carriers to provide comparatives numbers to what was presented at today's meeting.

**10. Subcommittees Reports and Updates – Facilitated by Jose Hernandez, LIOB Chair (20 minutes) *Standing /Action/Discussion Item***

- a) Marketing & Outreach (Board Members Toledo, Gross, Watts & Pitcock)
- b) ESAP and CARE Implementation (Board Members Castaneda, Pitcock, Wimbley, Watts and Lopez)
- c) Workforce Education and Training (Board Member Hernandez & Castaneda)
- d) Water Industry (Board Members Stephenson, Lopez and Castaneda)
- e) Emerging Issues/Climate Change (Board Member Toledo)
- f) AB 327 Subcommittee (Board Members Hernandez, Lopez, Wimbley & Pitcock)

**Marketing & Outreach (Board Members Toledo, Gross, Watts & Pitcock)**

The Marketing & Outreach subcommittee didn't meet this quarter. The IOU's will be providing their annual report on their marketing & outreach strategies.

A motion was made by Board Member Toledo for Board Member Delgado-Olson to serve on the Marketing & Outreach subcommittee and the Emerging Issues subcommittee, motion seconded by Board Member Castaneda (Yes: Toledo, Delgado-Olson, Commissioner Sandoval, Lopez, Stephenson, Pitcock)

**ESAP and CARE Implementation (Board Members Castaneda, Pitcock, Wimbley, Watts and Lopez)**

Board Member Castaneda reported that the ESAP and CARE Implementation subcommittee met on December 11, 2014, February, 4, 2015 and May 27, 2015. The ESAP and CARE Implementation subcommittee has put together a best practices list of recommendations and/or endorsements in connection with predominantly ESA.

- The ESAP and CARE Implementation Subcommittee endorses the study on the non-energy benefits being performed by the IOU's. This study will add to the work by the cost-effectiveness working group in connection with some of the issues that have been raised within the LINA report.
- The ESAP and CARE Implementation Subcommittee endorse the sanction of the CPUC on the working groups on mid-cycle as well as cost effectiveness.
- The ESAP and CARE Implementation Subcommittee endorses PG&E's go-back policy in its application, the subcommittee felt that this was a good approach in terms of renewing and revitalizing.
- The ESAP and CARE Implementation Subcommittee endorses the ESA 2020 and beyond in PG&E's application.

Board Member Castaneda reported that the subcommittee discussed LED replacements as part of the new application across the board as opposed to CFL's, as well as endorsing air conditioning or HVAC in climate weather zones, including climate zone 13. The subcommittee was not able to come to a consensus; however, this is a topic that the subcommittee will continue to discuss. The subcommittee also discussed CSD's role in connection with the drought and cap-n-trade activities. There was discussion about leveraging the cap-n-trade activities in the weatherization space with ESA. Board Member Wimbley will be discussing this issue at a later meeting. Lastly, the subcommittee discussed convening a future joint meeting with the Marketing and Outreach subcommittee

**Workforce Education and Training (Board Member Hernandez & Castaneda)**

The Workforce Education and Training subcommittee did not meet.

**Water Industry (Board Members Stephenson, Lopez and Castaneda)**

Board Member Stephenson reported that the water industry subcommittee met on May 27, 2015. The subcommittee discussed issues on the droughts as well as existing Legislation. Some of the issues the water subcommittee would like to consider and focus on are on how to require retrofitting on all real property. This is currently done on a County by County basis, but some counties require that every house or property that is resold be up to date on the current standards. More thought needs to be given on how to get the State to recognize this and to put this into place for property re-sales or possible lease properties or leases for apartments or rentals. He mentioned that a lot of the multi-residential properties on direct install are running with old fixtures. The water subcommittee also discussed the possibility of only allowing smart water controllers to be sold in California and added that at this point in time, there are all types of controllers that are out there for irrigation systems, smart water controllers that control the flow and would not allow the irrigation system to come on in rain events. These devices produce significant savings, due to the fact that a lot of people do not manage their irrigation controllers within the State. The subcommittee also discussed the removal of purging requirements on evaporative coolers. Board Member Castaneda suggested a discussion on this item at the next LIOB meeting as there are alternatives with this particular measure and data on how to save a considerable amount of water.

Lastly, the water subcommittee discussed ways to allow more gray water and rain capture use within the State and added that not all jurisdictions allows gray water, and that there needs to be education and outreach as there is a tremendous amount of wasted water can be very easily be used as gray water to irrigate houses, lawns, plants, vegetable plants and for many other uses.

**Emerging Issues/Climate Change (Board Member Toledo)**

Board member Toledo reported that as previously mentioned public education is a critical component for the vulnerable population. Natural disasters are very sudden and there has to be a plan for readiness for disaster in emergency situations. With the assistance of Board member Delgado-Olson the emerging issues/climate change subcommittee will be able to brainstorm on "how" and "who" is going to be responsible for that public education. This education can start with elementary or pre-school education, as habits become changes in lifestyle.

**AB 327 Subcommittee (Board Members Hernandez, Lopez, Wimbley & Pitcock)**

The AB327 subcommittee did not meet.

**Future Meetings Dates & Agenda Items for Future Meeting Discussion Item**

Annual Lifeline Marketing & Outreach presentation. The annual report should be done during the spring LIOB meeting and should include comparative numbers with today's reporting.

Update on the LINA report.

Locations for LIOB meeting in 2016 (Redding, Eureka, LA)

LIOB meeting adjourned at 4:26pm

<u>Upcoming Meetings</u>	
Wednesday, August 19 <sup>th</sup> , 2015 City of Santa Ana Council Chambers 22 Civic Center Santa Ana, CA 92701	Thursday, October 29 <sup>th</sup> , 2015 Seaside City Hall Council Chambers 440 Harcourt Ave Seaside, CA 93955

# *Public Workshop*

*9:40am – 11:40pm*

*Workshop in Proceedings*

*A.15-02-001, et al. Small and Multi-Jurisdictional  
Utilities*

*and*

*A.14-11-007, et al. Large Utilities California  
Alternate Rates for Energy and Energy Savings  
Assistance Programs*

*11:40am -12:30pm*

*Party and Public Comment on the IOU Reports*

*Small Multi-Jurisdictional Utilities*  
*(SMJUs)*

# PacifiCorp

## LIOB Workshop

August 19, 2015



*Let's turn the answers on.*

## Pacific Power Overview

- Pacific Power serves 794,699 customers in California, Oregon, and Washington.
- California's 36,000 residential customers cover 12,000 miles.
- Thirty-nine percent of our customers qualify for low income programs (200% of FPG).
- CARE participation is 83% of eligible customers.
- ESA weatherization services provided by Community Based Organizations (CBOs) in Siskiyou, Modoc, and Del Norte counties.



# Pacific Power CARE Program

## CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	11,247	13,887	81%	\$57,427	52%	\$1,927,199
2014 Year-End	11,552	13,880	83%	\$78,906	72%	\$3,434,611
2013 Year-End	10,975	13,861	79%	\$70,676	64%	\$3,076,631

# Pacific Power ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	77	150	51%	\$176,836	19%
2014 Year End	122	150	81%	\$506,506	54%
2013 Year End	188	150	125%	\$757,500	81%

# CARE Outreach

## Successes

- Increased penetration rate by 10% from 2012 to 2014.
  - In addition to radio ads, grocery bags, and bill inserts, a direct mail application was sent to all residential customers.
  - Ongoing communication with the Yurok Tribal Authority, Elk Valley Rancheria, and Smith River Rancheria Housing Authority.
  - LIHEAP recipients not on CARE were automatically enrolled and recertified on a quarterly basis.
  - Distributed program information to senior centers, social services, and food banks.
  - Online applications and promotion by our call centers when a customer calls to open an account.

## Budget Cycle 2015-2017

- Increase penetration to 90% by 2017.
  - Continue annual direct mail program applications to all residential customers.
  - Proposed Needs Assessment analysis/study to update and verify the number of low income customers eligible for CARE/ESA in our service territory.
  - Continued work with CBO's to promote the CARE program when customers apply for energy assistance through LIHEAP.

# ESA Outreach

## Successes

- From 1986 to end of 2015, 4,450 homes have received weatherization services or 86% of eligible households.
- By the end of 2017, the goal is to have 91% of eligible houses weatherized households.
- Annual goal of 150 homes will achieve our 91% penetration rate.

## Challenges

- Natural gas service is not available in our service territory, thus no utility partnerships.
- Propane and wood are the alternate heating source for customers.
- An estimated 38% of our customers heat their homes with electric heat.
- Rural territory with approximately 4 customers per mile which results in a long drive time to provide services.

# Looking Forward

## Budget Cycle 2015-2017

- Continue to partner with CBOs to leverage LIHEAP weatherization funding with ESA budget.
- Continue to market to all residential customers.
- Needs assessment analysis/study to help identify income eligible households and reach more homes.
- Encourage CBOs to identify and serve multifamily units.

## Drought Relief

Current ESA program includes:

- Faucet aerators
- Low flow showerheads

Proposed to implement:

- Thermostat controlled showerheads
- High efficiency clothes washers
- Distribution of dye tablets to detect toilet leaks

# Pacific Power Contacts

## CARE & ESA Program

Melissa Nottingham  
Customer & Regulatory Manager  
[Melissa.Nottingham@PacifiCorp.com](mailto:Melissa.Nottingham@PacifiCorp.com)  
503.813.5136

*Investor Owned Utilities (IOUs)*

## **Southern California Edison Report Low Income Oversight Board (LIOB) Meeting & California Public Utilities Commission Workshop**

August 19, 2015

Santa Ana, CA

SOUTHERN CALIFORNIA EDISON

Leading the Way in Electricity<sup>SM</sup>

### ***Southern California Edison Marketing Update***

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August 2015

## Marketing Overview

**Ethnic advertising and community outreach continue to be key components of SCE's local marketing, education, and outreach efforts.**

Through June 2015, SCE has or is purchasing paid advertising in 82 ethnic media outlets, of which 54 (66%) are ethnic-owned.

- Reaching Hispanic, Asian, Native American and African-American markets
- Produced in six languages: English, Spanish, Cambodian (Khmer), Chinese (Mandarin and Cantonese), Korean, and Vietnamese



## Marketing and Community Outreach

### Ethnic Community Outreach:

- To reach our ethnic and hard-to-reach customers, SCE continues to leverage established relationships with:
  - Community Based Organizations
  - Faith Based Organizations
  - Capitation Agencies (+200 agencies)
  - City and Government Partners
  - Native American Tribal Groups

### Grassroots Outreach:

- Community Forums
- Emergency Preparedness Forums
- Ethnic Events
  - Earth Day, Cinco de Mayo and Independence Day Events
  - Local Community Events
  - "Helping Our Customers Succeed" community events in Irwindale, Santa Clarita and Fullerton
- Door-to-door canvassing for Energy Savings Assistance program
  - Majority of customer leads are generated by SCE and provided to contractors who may conduct follow-up outreach



## 2015 Income-Qualified Marketing

### Objective:

- Increase enrollment and participation, among qualified customers, in CARE/FERA and Energy Savings Assistance (ESA) Program.

### Tactics:

- Direct to consumer
  - Direct mail
  - E-mail
  - Bill onsert messaging
- Mass media
  - Display/Mobile
  - Search Engine Marketing
  - Print
  - Social
- Community Outreach Events

### Markets:

- General Market
- African American
- Asian (Chinese, Korean, Vietnamese, Filipino and Cambodian)
- Hispanic
- Native American
- Seniors

**Up to 30% off your electric bill**

**Save up to 30%**

**EDISON Customer Connection**

**Spend Less Time Worrying About Your Electric Bill**

Like many households in Southern California, you're probably looking for ways to reduce your expenses, and we may be able to help. We want you to be aware of some solutions to help meet your monthly needs.

We have two new programs designed to help eligible customers and families who may need support meeting their energy needs. If you household meets certain income qualifications, you may receive a discount of approximately 30% on your monthly electric bill. For more information, please contact Edison's CARE and FERA programs. Edison's CARE and FERA programs offer a discount on electric bills if you have gross annual income of your household and you meet your income eligibility criteria by more than 5%.

**Income Qualifications**

Number of Persons in Household	Income Qualification (CARE and FERA)	Income Qualification (FERA)
1-2	Up to \$15,000	Up to \$15,000
3	Up to \$20,000	Up to \$20,000
4	Up to \$25,000	Up to \$25,000
5	Up to \$30,000	Up to \$30,000
6	Up to \$35,000	Up to \$35,000
7	Up to \$40,000	Up to \$40,000
8	Up to \$45,000	Up to \$45,000
Each additional person	\$5,000	\$5,000

\*Gross gross before taxes household income from all sources.

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SOUTHERN CALIFORNIA EDISON

Leading the Way in Electricity<sup>SM</sup>

## 2015 Energy Savings Assistance Program Marketing

### Target:

- All eligible and willing low income customers.
- In-language, hard-to-reach, and underpenetrated areas continue to be a priority.
- Hard-to-reach defined as those not as easily accessed with traditional marketing and outreach methods and activities - those living in rural communities, immigrants with limited English proficiency, or those who are non-Spanish speaking.

### Direct Marketing:

- Encourages customer to contact local ESA Program contractor directly, and assists with outreach efforts.
- English-Spanish direct mail to 280,000 ESA-eligible customers year-to-date Q2.
- English-Spanish email to 37,000 eligible customers year-to-date.

### Mass Marketing:

- Display, mobile, social and search engine marketing (SEM) launching in Q4.
- Exploring ethnic print.

### Outbound Calling:

- Outbound calling was traditionally a successful complement to direct marketing efforts.
- SCE plans to reinstate outbound calling in Q3 and expects to see renewed lead generation as a result.

**Lower Energy Bills. Free Appliances. Free Installation.**

**Energy Savings Assistance Program**

**Income Qualifications**

Number of Persons in Household	Income Qualification (CARE and FERA)	Income Qualification (FERA)
1-2	Up to \$15,000	Up to \$15,000
3	Up to \$20,000	Up to \$20,000
4	Up to \$25,000	Up to \$25,000
5	Up to \$30,000	Up to \$30,000
6	Up to \$35,000	Up to \$35,000
7	Up to \$40,000	Up to \$40,000
8	Up to \$45,000	Up to \$45,000
Each additional person	\$5,000	\$5,000

\*Gross gross before taxes household income from all sources.

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SOUTHERN CALIFORNIA EDISON

## 2015 Summer Readiness Campaign

### Objectives:

- Increase awareness and adoption of DSM programs, energy management tools, and energy conservation behavior change during summer months.
- Help customers stay safe during the high heat.

### Target:

- All residential customers with special attention paid to disabled, ethnic and senior markets.

### Translations:

- English, Spanish, Asian (Vietnamese, Korean, Chinese)

### Media Channels:

- Radio, Digital, Direct Mail, Email, Social Media, Media Relations

### Other Channels:

- Bill Messaging, SCE.com



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SOUTHERN CALIFORNIA EDISON

Leading the Way in Electricity<sup>SM</sup>

## 2015 Safety Campaign

### Objective:

- To continue the Safety message from 2012 - 2014 motivating customers to think about safety around downed and overhead power line safety.

### Markets:

- General Market, Hispanic, Asian (Cambodian, Chinese, Korean, Vietnamese)

### Media Channels:

- Broadcast TV, Cable TV, Radio, Out of Home, Online/Digital, Print, Media Relations

### Other Channels:

- Bill Messaging, SCE.com



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SOUTHERN CALIFORNIA EDISON

## Marketing Appendix

### Appendix

#### SCE 2015 Advertising and Media

African American Consumer Market  
Asian Consumer Market  
Hispanic Consumer Market

	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
<b>African-American Media Outlets</b>					
	Print				
	Black Voice News	X	X		
	Inland Valley News	X	X		
	LA Sentinel	X	X		
	WAVE Newspaper Group	X	X		
	Long Beach Times	X	X		
	Precinct Reporter Group (Precinct Reporter, Long Beach Leader, Tri-County Bulletin)	X	X		
	The Pasadena/SG Valley Journal News	X	X		
	Tri County Sentry	X	X		
	California Crusader	X	X		
	Inglewood Today	X	X		
	Our Weekly Los Angeles	X	X		
	San Bernardino American News	X	X		
	Compton Bulletin	X	X		

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	Print (Market)				
	Asian Journal (Filipino)	X		X	
	China Press (Chinese)			X	
	Chinese LA Daily News (Chinese)			X	
	California Journal (Filipino)			X	
	Korea Daily (Korean)	X		X	
	Korea Times (Korean)	X		X	
	Nguoi Viet (Vietnamese)	X		X	
	Sing Tao Daily News (Chinese)	X		X	
	US Asian Post (Filipino)	X			
	Viet Bao Daily News (Vietnamese)	X		X	
	World Journal (Chinese)	X		X	
	Weekend Balita (Filipino)	X		X	

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	Radio (Market)				
	EDI - KWRM AM 1370 (Mandarin)	X			X
	Network Asia - KAZN 1300 AM (Mandarin)	X			X
	VNCR (Vietnamese)	X			X
	Kali Cambodian (Cambodian)	X			X
	KMRB				X
	Radio Seoul - KMPC 1540 AM (Korean)	X			X
	Radio Korea - KFOX 1650 AM (Korean)	X			X
	Little Saigon Radio - KVNK 1480 AM (Vietnamese)	X			X
	Saigon Radio Hai Ngoai - KALI 106.3 FM (Vietnamese)	X			X
	Network Asia - KMRB 1430 AM	X			X
	Radop L - KYPA 1230 AM	X			X

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	TV				
	KSCI 18	X			
	IAVC	X			
	ETTV	X			
	ZWTV	X			
	TVB	X			
	KBS	X			
	MBC	X			
	Little Saigon	X			
	Saigon TV	X			

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Print				
	Eastern Group Publications	X			
	El Mojave	X			
	El Sol	X			
	La Opinion	X			
	Azteca News	X			
	La Prensa Hispana	X			
	HOY	X			
	Impacto	X			
	La Gaceta	X			
	Vida Newspaper Group	X			
	Dia A Dia	X			

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Radio				
	KFSO- La Preciosa 92.9 FM	X			X
	KLAX-FM "La Raza" 97.9	X			X
	KLBN	X			X
	KLYY-FM	X			X
	KRDA-FM	X			X

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Radio				
	KLLE-FM	X			X
	KOND-FM	X			X
	KHIT-FM	X			X
	KXOL	X			X
	KXXZ	X			X
	KBFP-AM	X			X
	KGST-AM	X			X
	KRQB	X			X
	KAEH	X			X
	KXRS	X			X
	KXLM	X			X
	KMLA	X			X
	KLJR	X			X
	KOXR	X			X

## Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Digital	Partners				
	Online				
	Brightroll	I			
	CBS Digital	E			
	Conversant	I			
	Maxpoint Interactive				I
	Millennial Media	I			
	Pandora	E			I
	USA Today	E			E
	Videology	I			
	Time Warner				E
	Synacor				E
E = English Banner Ads      I = In-language Banner Ads					

## ***Southern California Edison ESA and CARE Enrollment, Penetration, and Expenditure Update***

August 2015

## Southern California Edison CARE Program

### CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	1,285,934	1,499,342	85.8%	\$1,629,847	23%	\$150,544,343
2014 Year-End	1,311,210	1,499,830	87.4%	\$5,094,434	73%	\$386,148,028
2013 Year-End	1,335,607	1,410,534	94.7%	\$4,797,688	39% *	\$358,025,586

Notes: \* D.14-08-030 addressed SCE's Petition for Modification of D.12-08-044, filed in 2012, to reduce the 2012-2014 CARE Administration budget. The 2013 budget was reduced from \$12,256,000 to \$7,429,460.

## Southern California Edison ESA Program

### Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	22,594	87,389	26%	\$21,986,816	30%
2014 Year End	76,983	87,389	88%	\$55,886,233	77%
2013 Year End	69,031	87,389	79%	\$55,604,816	77%

Notes:

# Southern California Edison ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$48,300,000	\$72,736,630	\$24,436,630	\$88,218,830	\$112,655,460

2009 - 2014	Total Unspent 2009 - 2014	Unspent as Percent Of Authorized	2009 - 2014 Explanation
Measures	\$71,211,022	20%	SCE underspent in all years except 2010. Reasons for underspending include: <ul style="list-style-type: none"> <li>Nearly doubling budget in 2009 requiring workforce expansion</li> <li>Meeting homes treated goal in 2011 while underspending by \$13 million</li> <li>2012 month-to-month bridge period created great program uncertainty</li> <li>In 2013 and 2014 factors include customer unwillingness and the Modified Three Measure Minimum Rule</li> </ul>
Local & Statewide Marketing	\$3,863,803	65%	
Regulatory Compliance	\$1,154,126	39%	
General Administration	\$9,024,771	33%	
CPUC Energy Division	\$298,835	63%	
Other	\$2,666,273	24%	
Total	\$88,218,830	22%	

**Notes:** The authorized ESA budgets for 2009 – 2015 total approximately \$476 million

"Other" includes Training, Inspections, Studies, Pilots. "Measures" include Enrollment and In-home education

## *Southern California Edison ESA and CARE Workshops Update*

August 2015

## SCE 2015-17 ESA and CARE Application

- SCE's Application is designed to make progress towards the Commission's goals, including:
  - Encourage all eligible & willing customers to participate; protect ratepayers from ineligible participants
  - Make progress towards goal of providing all customers eligible for ESA the opportunity to participate
- SCE proposes eliminating rules that hinder provision of measures and Energy Education to eligible customers (e.g., Modified Three-Measure-Minimum [3MM] Rule and Go-Back Rule):
  - Simple-to-install measures, including Energy and Water Education, at every visit
  - Through June SCE enrolled 4,500 new participants (but did not treat the home) due to the 3MM Rule
- SCE proposes a multi-family strategy that integrates ESA program delivery with its EE programs, increasing the ability to serve tenants and property owners
- SCE proposes ESA water measures for single-family, multi-family, & mobile home customers:
  - Faucet Aerators & Low Flow Showerheads, Water Heater Blankets/Pipe Wrap, Thermostatic-Controlled Shower Valves (New), In-Home Energy Education
  - Will evaluate high-efficiency clothes washers and tub diverters mid-cycle
  - Water-Energy Calculator initial results show good benefits for water utilities (only 5% electric benefits)
- SCE proposes to return unspent funds annually (if any) to customers to alleviate rate impacts

## Southern California Edison Contacts

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ESA Program – Roberto Del Real, Manager  
(626) 302-0720 [roberto.delreal@sce.com](mailto:roberto.delreal@sce.com)

## Low Income Oversight Board Meeting

### Southern California Gas Company

#### Highlights of 2014 CARE and ESA Programs M&O Ethnic & Ethnic Owned Accomplishments

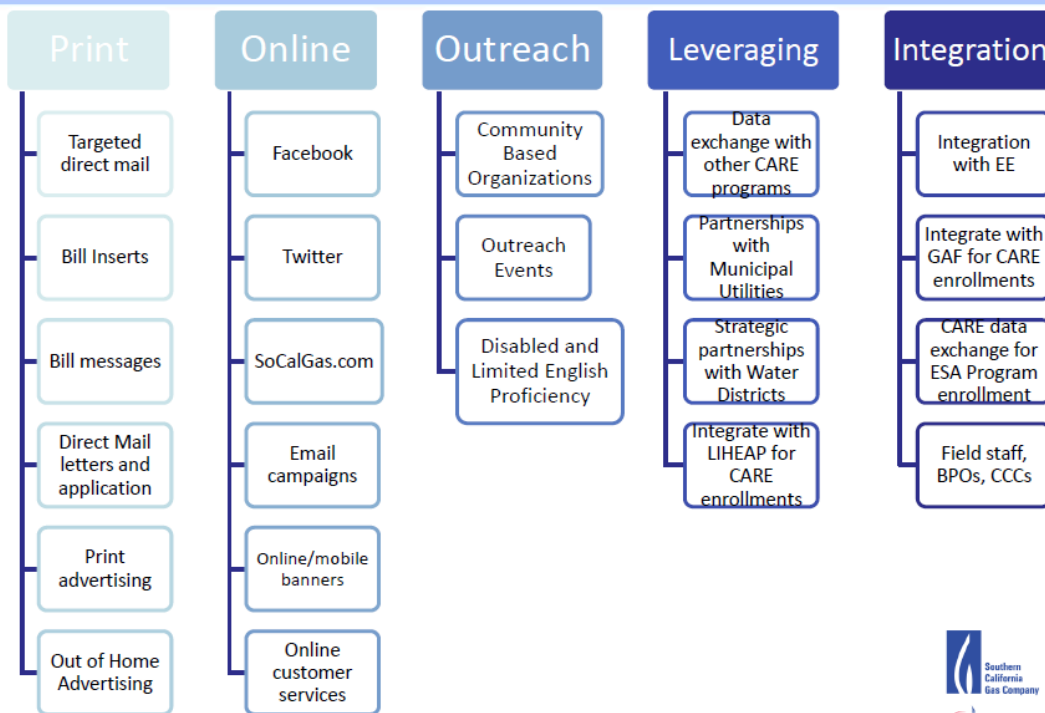
*August 19, 2015  
Santa Ana, CA*

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## Agenda

- 1 • Introduction
- 2 • SoCalGas CARE and ESA Program M&O
- 3 • 2014 M&O Ethnic and Ethnic Owned Highlights
- 4 • 2014 Budget Spending Highlights
- 5 • 2015 Planned M&O

# CARE/ESA Program Marketing & Outreach



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## CARE & ESA Program – Outreach and Enrollment Strategy

Target Hard-to-Reach Geographic Regions

Leveraging with CBOs and Non-profit organizations to build program awareness

Target customers with disabilities

Leverage relationships with Organizations that offer services to customers with disabilities  
Outreach to Medical Baseline participants

Appeal to customer benefits and sustainability movement

Utilize demographics data and customer segmentation analyses



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# CARE & ESA Program Ethnic Outreach in Mass Media Campaigns

In 2014 SoCalGas demonstrated its commitment to **Ethnic Outreach** in its  
Mass Media Campaigns



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## CARE/ESA Program Marketing & Outreach

### ACTIVITIES

#### Print Campaigns:

- Bill inserts – to highlight the new CARE eligibility guidelines annually in June.
- Direct Mail letters/applications – to encourage customers to sign-up for the programs throughout the year.

**Newspapers & Audience** – Print advertising in ethnic-owned media, targeting Hispanic, African American, and Asian audiences.

- Hispanic: Eastern Group Publications, La Opinión, HOY, La Nueva, San Fernando Valley/El Sol, La Nueva Voz, Vida and El Latino.
- African American: LA Watts Times, Our Weekly, Los Angeles Sentinel, The Wave Publication and LA Focus on the World.

**Online/mobile banner ads** – to create awareness among customers that may potentially be eligible for CARE, and also an opportunity to target customers that have already visited the website.

**Out of Home advertising** – interior/exterior bus ads, bus shelters, gas pump ads and tear sheets

# CARE & ESA Program Marketing & Outreach

Digital Media, Outdoor Ad, Out of home and Social Media encouraging customers to apply for the CARE program.

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Sempra Energy utility®

# CARE & ESA Program Marketing & Outreach

**¡SOMOS PARTE DE TU COMUNIDAD!**

SoCalGas  
A Sempra Energy utility

¿Te gustaría ahorrar dinero y energía con los Programas de Asistencia al Cliente? Para ver si calificas, visita [socalgas.com](http://socalgas.com) (busca la palabra "ASISTENCIA").

Ahorra 20 por ciento en tu cuenta mensual de gas. Mejora tu hogar para que use menos energía y sea más confortable, ¡sin costo para ti!

**CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) – 20 Percent Discount**

**TARIFAS ALTERNAS PARA ENERGÍA DE CALIFORNIA (CARE) – Descuento del 20 por ciento en su cuenta de gas**

**APPLICATION INSIDE SOLICITUD ADENTRO**

**WE ARE A PART OF YOUR COMMUNITY!**

You could save up to 20 percent on your monthly gas bill through our CARE program, also see if you qualify to upgrade your home to be more comfortable and energy efficient at no cost to you.

Learn more at [socalgas.com](http://socalgas.com) (Search "Assistance")

To save on your monthly gas bill call 1-800-342-4545

To upgrade your home call 1-800-331-7593

**ENROLL TODAY AND SAVE!**

Southern California Gas Company offers customer assistance programs that may help you save money and energy.

California Alternate Rates for Energy (CARE) offers 20 percent off your natural gas bill.

Energy Savings Assistance Program offers no cost energy-saving home

For more information and to find out if you qualify, please visit [socalgas.com](http://socalgas.com) (search "assistance"), or call today:

1-800-427-2260  
CARE & Medical Baseline: 1-800-331-7593  
Energy Saving Assistance Program: 1-800-331-7593

Multilingual Call Center available:  
Cantonese: 1-800-427-1426  
Korean: 1-800-427-6477  
Mandarin: 1-800-427-1425  
Vietnamese: 1-800-427-0495

**Energy Savings Assistance Program**

SoCalGas  
A Sempra Energy utility®

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Sempra Energy utility®

# CARE Program Digital (Online)

**Media Mix CARE**

- Online and Mobile banners
- Social Media
- Print Ads
- Out of Home Ads
- Radio

**Radio Spots**

English Spanish

Extra money could be right under your nose.

YOU COULD SAVE 20 PERCENT ON YOUR GAS BILL. Learn more at [sempaenergy.com/care20](http://sempaenergy.com/care20)

**Online Banners shown frame by frame.**

Puede que tengas dinero extra debajo de tus narices.

Amiguis si calificas para el programa CARE y AHORRA 20 POR CIENTO en tu cuenta del gas.

Extra money could be right under your nose.

SAVE 20 PERCENT on your gas bill.

**Print Ads**

Extra money could be right under your nose.

Glad to be of service.®

**Southern California Gas Company** **Sempra Energy utility®**

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# ESA Program Digital (Online)

**Media Mix Energy Assistance Program**

- Online and Mobile banners
- Social Media
- Print Ads
- Out of Home Ads
- Radio

**Bus Interiors**

OUR OWN TEAM OF CONTRACTORS AT NO COST.

Energy saving home improvements at no cost to you. Learn more at [sempaenergy.com/esa20](http://sempaenergy.com/esa20)

**Gas Pumps/ Tear Pads**

MY OWN TEAM OF CONTRACTORS AT NO COST.

Our Energy Savings Assistance Program provides home improvements at no cost to you. See if you qualify and learn more at [sempaenergy.com/esa20](http://sempaenergy.com/esa20)

**Online Banners shown frame by frame.**

SIN COSTO PARA TI.

MEJORAS AL HOGAR SIN COSTO NI SI ERES INQUILINO O PROPIETARIO.

INFORMATE

**Print Ads**

NUESTROS CONTRATISTAS, Y SIN QUE NOS CUESTE.

Nuestro programa Energy Savings Assistance Program para el ahorro de energía provee mejoras para el hogar, sin costo.

**Southern California Gas Company** **Sempra Energy utility®**

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Print Ads

 Southern California Gas Company  
A Sempra Energy utility®

## Multi-lingual Collateral

## Multi-lingual Collateral



Southern California Gas Company

A Sempra Energy utility®

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# Community Based Organizations

## Framework for Outreach Events

- Focus on Hard-To-Reach Communities
  - Customers with disabilities, with limited English Proficiency; Customers who are seniors; or Customers in rural communities
- Work with local community organizations
- Connect with the community & related programs
- Communicated/advertise through the community or through local media.

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## Community Sponsorships Tet Festival



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## Community Sponsorships Cuadrilla De Semana



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## Community Partnerships Delhi Center, Santa Ana

### Low-Cost Broadband & SoCalGas Low-Income Programs, June 2015

- “Bring your Gas Bill to the Event”
- Inform the audience on how to sign up for low-cost broadband
- Demonstrate the advantages of broadband connectivity, case study SoCalGas programs
- Go through CARE signs up with customers that have bill information.

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# Community Partnerships Back to School Night

- Using Technology with SoCalGas and with Your Child's Education
- Back-to-School Night, Academy for Environment & Social Policy
  - Boyle Heights, Lincoln Heights Community
- Demonstration of:
  - Signing up for low-cost broadband
  - Using the SoCalGas website for energy efficiency information & low-income programs
  - Accessing the school portal for parent-student information.
- Follow up meetings and relationship with the school.

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# Community Sponsorships Mariachi Festival



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## Community Partnerships Westside Center for Independent Living

- Using Technology for Independent Living, June 2015
  - SoCalGas & WCIL & Telscape (Lifeline for Mobile)
  - Inform the audience on how to sign up lifeline for mobile.
  - Inform the audience on the similar eligibility guidelines for SoCalGas low-income programs.
  - Go through CARE signs up with customers that have bill information.

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## Community Sponsorships SoCalGas & WCIL



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# Community Sponsorships Santa Maria – CalFresh Outreach



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## 2014 CARE Program Budget\*

<<<<< 2014 >>>>>

Budget Category	Authorized	Actual
<b>Outreach</b>	<b>\$3,750,223</b>	<b>\$4,424,684</b>
Processing, Certification, Recert.	\$4,488,248	\$1,033,376
Post Enrollment Verification	\$3,744,000	\$333,764
IT Programming	\$2,937,450	\$897,354
Pilots	\$180,000	\$75,000
Measurement & Evaluation	\$18,659	\$63,254
Regulatory Compliance	\$242,507	\$367,741
General Administration	\$943,426	\$808,918
CPUC Energy Division	\$60,000	\$17,512
<b>SUBTOTAL MGMT BUDGET</b>	<b>\$16,364,513</b>	<b>\$8,021,603</b>
Subsidies & Benefits	\$131,142,177	\$109,488,808
<b>TOTAL PROGRAM BUDGET</b>	<b>\$147,506,690</b>	<b>\$117,510,411</b>

\* Table does not reflect fund shift activities performed to align budget with actual expenditures.



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## 2014 ESA Program Budget\*

<<<< 2014 >>>>

Budget Category	Authorized	Actual
Energy Efficiency (Measures)**	\$121,317,558	\$85,793,909
Training Center	\$681,105	\$331,476
Inspections	\$3,361,051	\$1,799,868
Marketing & Outreach	\$1,198,436	\$1,187,445
Statewide ME&O	\$100,000	\$0
Measurement & Evaluation Studies***	\$91,667	\$(1,885)
Regulatory Compliance	\$295,333	\$248,650
General Administration	\$5,286,041	\$4,414,388
CPUC Energy Division	\$86,000	\$7,505
<b>Total Program Costs</b>	<b>\$132,417,191</b>	<b>\$93,781,355</b>

\*Pursuant to D.14-08-030, budgets reflect the Phase II Decision authorized 2014 budget amounts.

\*\*Category includes funds shifted to PY2014 in Appliances from PY2012 unspent funds.

\*\*\*Credit balance in M&E of (\$1,885) associated with prior year activity.

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## 2014 Print Media Spending

**Print Media: \$121,160.25**

Hispanic	African American
El Aviso	LA Focus on the Word
La Prensa Hispana	LA Watts Times
Vida	Los Angeles Sentinel
Eastern Group	Our Weekly
El Sold de Valle	Wave Publications
Hoy	
La Nueva Voz	
La Opinion	
Santa Barbara Latino	



## 2014 Media Spending

Digital = \$59,000	Radio = \$131,883	Outdoor = \$57,682	TV = \$3,000	Experiential = \$13,590
Hispanic	Hispanic	Hispanic	Hispanic	Grass Roots
Batanga	Radio Market Spanish Formats	Transit Bus (interiors)	KWHY	KWHY
Facebook	The Campesina Network (90.5 & 92.5)	Transit Bus (Kings)		
Bride Mob		Gas station ad		

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## 2014 Ethnic and Ethnic Owned Media Spending

**Total Ethnic and Ethnic Owned Media Spend= \$383,315**

**“ONLY” Ethnic Owned Spending = \$177, 811**

Market	Business	Live Dates	Spend
Hispanic	Eastern Group Publications	June 5 <sup>th</sup> and 19 <sup>th</sup>	\$5,326
	La Campesina Network	Year Round	\$120,000
	El Aviso		\$21,000
	La Prensa Hispana	Year Round	\$12,000
African American	Our Weekly	June 5 <sup>th</sup> , July 3 <sup>rd</sup>	\$5,894
<b>Sub Total Spending</b>			<b>\$164,221</b>
Hispanic Experiential Activations	The Regan Group	June 13 <sup>th</sup> to July 12 <sup>th</sup>	\$13, 590
<b>Total Spending</b>			<b>\$177,811</b>

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# 2015 (Planned) Media Spending

- Tri-Coastal Mass Media
  - Digital, Direct Mail, Print, Radio, Out of Home
  - Ventura, Santa Barbara, and San Luis Obispo Counties
- Asian Language Campaigns & Events
  - Tet
  - Cambodian New Year
  - Thai New Year

## CARE & ESA Program Marketing & Outreach



# SoCalGas CARE Program

## CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	1,564,499	1,899,163	82.38%	\$59,358,200	40.24%	\$55,601,596
2014 Year-End	1,568,011	1,898,302	82.60%	\$117,510,411	80.00%	\$109,488,808
2013 Year-End	1,604,411	1,798,002	89.23%	\$125,388,452	86.00%	\$118,556,705
Notes:						

1

# SoCalGas ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	2015 YTD Expenditures	% of Authorized
2015 – June 30	32,955	136,836	24.08%	\$37,596,719	28.39%
2014 Year End	92,967	136,836	67.94%	\$93,781,355	71.00%
2013 Year End	106,948	136,836	78.16%	\$97,554,614	83.00%
Notes:					

2

# SoCalGas ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$80.8M*	\$131.4M	\$50.6M	\$113.3M	\$163.9M
2014		2014 Total Unspent****	Unspent as Percent Of Authorized	2014 Explanation
Measures**		\$104.4M	30%	Treated units below authorized.
Marketing & Statewide Marketing		\$0.7M	19%	Funding uncertainty associated with 6-month and month-to-month bridge funding in 2012.
Regulatory Compliance		\$0.1M	6%	Not applicable.
General Administration		\$2.5M	15%	Various.
CPUC Energy Division		\$0.2M	90%	Budget prepared per ED guidance.
Other ***		\$5.4M	44%	Treated units below authorized.
Total		\$113.3M	29%	

**Notes:**

\* Projected based on trailing twelve month expenses through July. SoCalGas has identified several strategies designed to improve on current performance levels.

\*\* Includes Energy Education and Customer Enrollment budgets.

\*\*\* Includes Training, Inspections and EM&V budgets.

\*\*\*\* Represents total carry forward balances as of year end 2014.

## SoCalGas Utility Contacts

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ESA Program – Mark Aguirre, Program  
Manager @ [MAguirre2@semprautilities.com](mailto:MAguirre2@semprautilities.com)

# Low Income Oversight Board

## Marketing and Outreach Update and Overview

August 19, 2015



## CARE & ESA Marketing & Outreach 2014 MEO Budget



Program	2014 CPUC Authorized	2014 MEO Budget Spent	% of 2014 MEO Budget Spent
CARE	\$2,300,352	\$2,434,024	106%
ESA	\$1,164,718	\$737,032	63%

## CARE & ESA Marketing & Outreach 2014 Media Spend

Ethnicity	2014 Media Spend	% of total spend
African American	\$42,265	6%
Chinese	\$15,404	2%
Hispanic	\$171,596	23%
Filipino	\$16,290	2%
Vietnamese	\$7,840	1%
<b>Total Ethnic Spend</b>	<b>\$253,395</b>	<b>34%</b>
Total Overall Spend	\$750,637	

*Ethnic media budget allocated across TV, Radio, Print, Online advertising*

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## CARE & ESA Marketing & Outreach 2014 Highlights

### General Awareness



- TV, print, radio, online advertising
- Social media
- Bill package
- SDG&E app and website

### Partner Education & Outreach



- CARE capitation agencies
- Energy Solutions Partners
- Multifamily outreach
- ESA Contractor Outreach

### Community Engagement



- Multicultural and rural outreach
- Seniors and special needs outreach
- SDG&E customer contact employees

### Direct Marketing



- Electronic/Direct mail
- Outbound calls
- Door-to-door canvassing

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## CARE & ESA Marketing & Outreach 2014 Highlights



### General Awareness

- TV, print, radio, online advertising
- Social media
- Bill package
- SDG&E app and website



Online Banner

Bill Insert

Mobile App

ESA Print Ad

Care Print Ad

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## CARE & ESA Marketing & Outreach 2014 Highlights



### Partner Education & Outreach

- CARE capitation agencies
- Energy Solutions Partners
- Multifamily outreach
- ESA Contractor Outreach



Partner eNewsletter



Partner Web Site

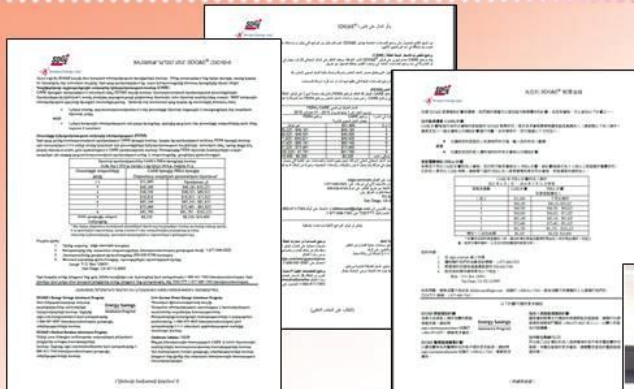


Partner Social Media



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## CARE & ESA Marketing & Outreach 2014 Highlights



In-Language Collateral



Branch Office Outreach

## Community Engagement

- Multicultural and rural outreach
- Seniors and special needs outreach
- SDG&E customer contact employees



Ethnic Market Outreach

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## CARE & ESA Marketing & Outreach 2014 Highlights

Find out if you qualify for a discount on your energy bill.

Customer Name:  
Account Number:

You meet the income guidelines below, you may qualify for at least a 20% discount on your bill.

It's easy to apply. Call our automated phone enrollment line 1-877-646-5525 or go to [sdge.com/ene](http://sdge.com/ene) to sign-up online.

Number in Household	CARE PROGRAM	ESA PROGRAM
1 or 2	\$31,460	Not eligible
3	\$39,080	\$39,080 - \$49,475
4	\$47,760	\$47,760 - \$59,625
5	\$56,420	\$56,420 - \$69,775
6	\$65,040	\$65,040 - \$79,925
7	\$73,660	\$73,660 - \$89,075
8	\$82,280	\$82,280 - \$99,225
Each additional person, add	\$8,120	\$8,120 - \$10,100

\*Eligible low-income households may qualify for additional discounts based on senior status, disability, and other factors.

If you have questions or would like more information on what to expect your bill, please e-mail [billdiscount@sdge.com](mailto:billdiscount@sdge.com) or call us at 1-800-481-7343.

CARE Direct Mail

Don't miss out on an energy bill discount

You may qualify for at least a 20% savings on your energy bill

Through the California Alternative Rates for Energy (CARE) program and the Energy Savings Assistance Program, eligible families can save at least 20% on their energy bill as well as receive free home improvements or appliances with new income guidelines in place. Most families are now eligible.

[Start the Application](#)

You will need your 10-digit account number found on your SDG&E bill.

To learn more, connect at [sdge.com/ene](http://sdge.com/ene)

View the income table and see if you qualify.

People in Household	Total Household Income
1-2	\$31,460

CARE/ESA Email



ESA Contractor Canvassing

## Direct Marketing

- Electronic/Direct mail
- Outbound calls
- Door-to-door canvassing

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## CARE & ESA Marketing & Outreach 2015 YTD MEO Budgets

Program	2015 Authorized MEO Budget	2015 MEO Budget Spent YTD	% of 2015 MEO Budget Spent
CARE	\$2,300,351	\$1,253,880	54%
ESA	\$1,240,563	\$441,494	36%

- YTD as of 6/30/15
- ESA MEO requested budget for 2015 includes Special Initiatives – awaiting CPUC decision before moving forward

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## CARE & ESA Marketing & Outreach 2015 Additional New Tactics

### General Awareness



- new testimonials featuring actual SDG&E customers who participated in both CARE and ESA programs

### Partner Education & Outreach



- live call campaigns for both CARE new enrollment and recerts
- Lifeline/Covered CA Partnership

### Community Engagement



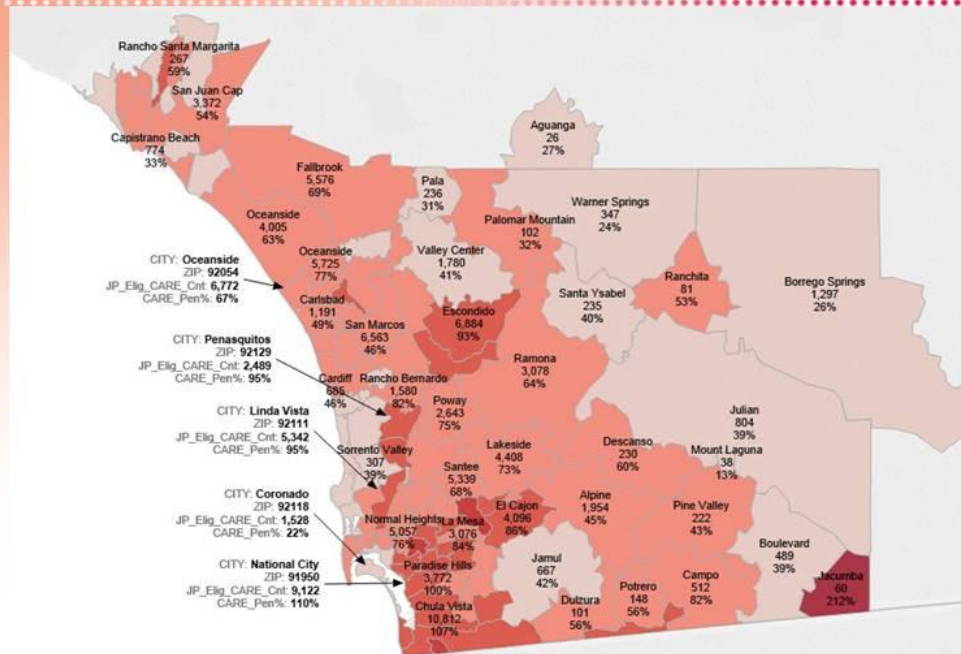
- new partnerships in rural and high poverty areas
- feedback sessions to review and share results/best practices
- increased participation at partner events in rural zip codes

### Direct Marketing

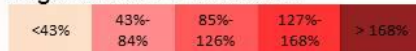


- enhanced segmentation and targeting using SDG&E customer profiles and Athens Research
- coordinated multi-touch effort with Partner Outreach and canvassing
- ESA post-treatment energy education for all household members

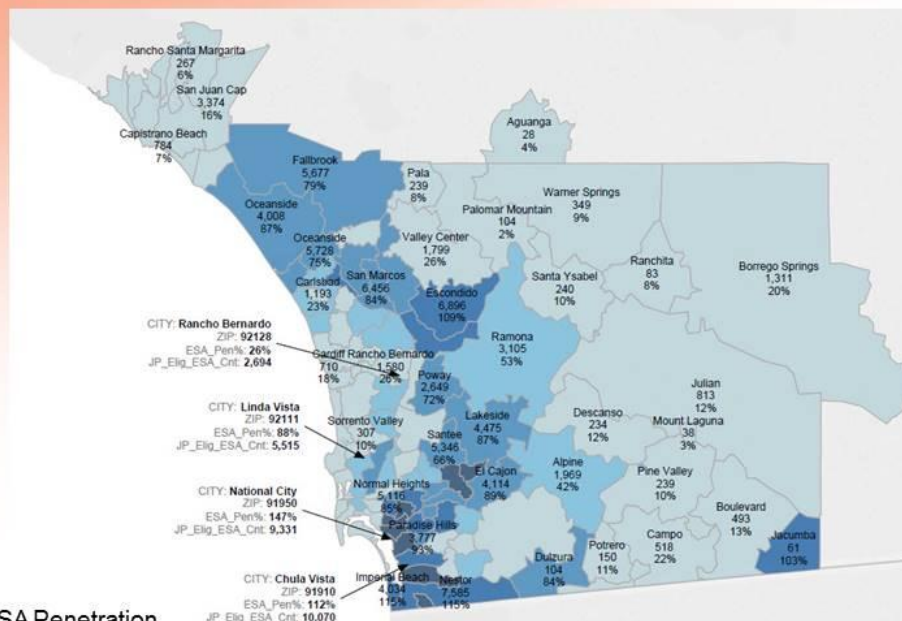
## CARE Marketing & Outreach 2015 Eligible Counts (Peterson Data) and Penetration



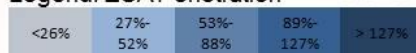
Legend: CARE Penetration



## ESA Marketing & Outreach 2015 Eligible Counts (Peterson Data) and Penetration



Legend: ESA Penetration



## *SDGE MEO Contact Info*

### CARE / ESA Marketing and Outreach Team

Name	Title	Phone	Email
Horace (Ty) Tantum	Marketing Manager	858-636-5580	<a href="mailto:HTantum@semprautilities.com">HTantum@semprautilities.com</a>
Claire Luffborough (Presenter)	Sr. Marketing Advisor	858-650-6122	<a href="mailto:CLuffborough@semprautilities.com">CLuffborough@semprautilities.com</a>
Kelly Prasser	Outreach & Engagement Manager	619-696-4230	<a href="mailto:KPrasser@semprautilities.com">KPrasser@semprautilities.com</a>
Laura Welty	Outreach Supervisor	619-540-3914	LKWelty@semprautilities.com

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## *Appendix*

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## CARE Marketing & Outreach

### Categorical Budget Percentages by Enrollment

CARE 2015 ESTIMATED ENROLLMENTS Target: 72,000				
MEO Category	Estimated Total Cost	Estimated Number of Customers Reached	Estimated Number of Customers Enrolled	Estimated Percent of Enrollments
Door-to-Door	280,000	25,000	9,000	13%
Mass Marketing	931,457	Not Available	20,000	28%
SDG&E Branch Offices	0	48,500	7,500	10%
Third Party & Community Outreach	450,000	Not Available	8,000	11%
SDG&E Customer Contact Center	0	180,000	8,000	11%
Data Sharing	0	2,500	2,500	3%
Bill Inserts	80,000	950,000	500	1%
Direct Mail	70,000	200,000	6,000	8%
Other			10,500	15%
<b>TOTAL</b>	<b>\$1,811,457</b>		<b>72,000</b>	<b>100%</b>

- "Not Available" tactics reach a number of customers that is difficult to assess. These tactics are used to support increase customer awareness and drive customers to take action through a community organization or self-service option, such as the IVR or web application.
- Mass Marketing includes Television, phone, print, and, email blast. Enrollments numbers include IVR and internet enrollments generated from these efforts.

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## ESA Marketing & Outreach

### Categorical Budget Percentages by Enrollment

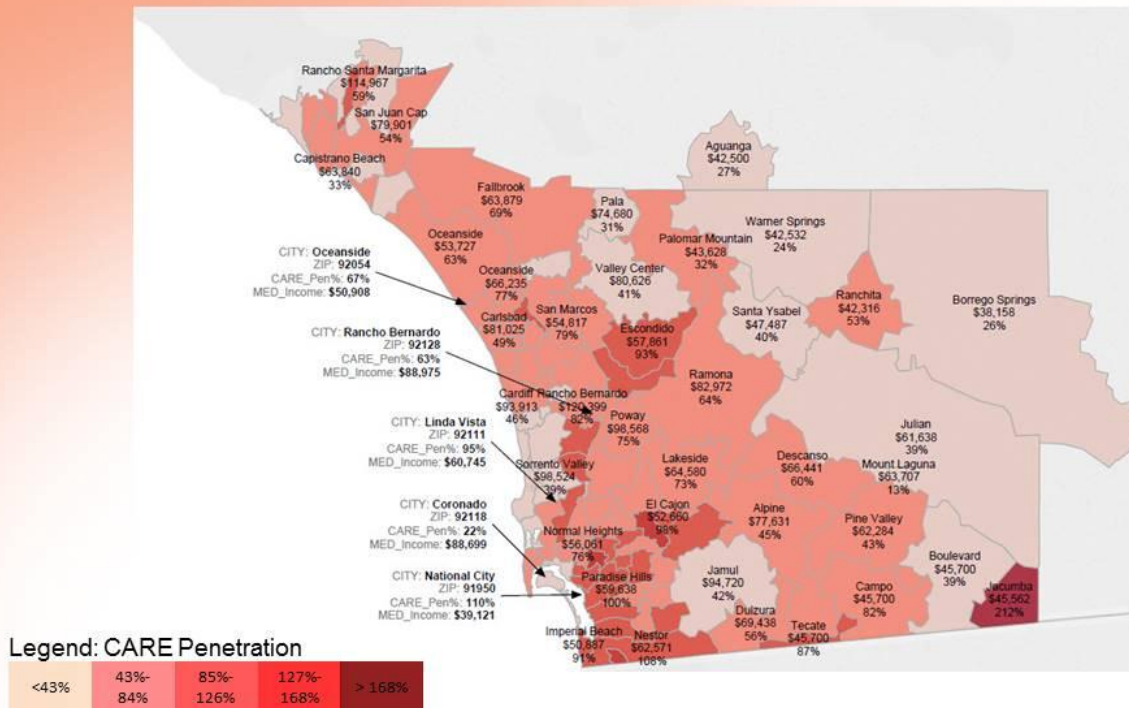
ESA 2015 ESTIMATED ENROLLMENTS Target: 20,216				
MEO Category	Estimated Total Cost	Estimated Number of Customers Reached	Estimated Number of Customers Enrolled	Estimated Percent of Enrollments
Door-to-Door	2,000	25,000	9,000	13%
Mass Marketing	545,627	Not Available	20,000	28%
SDG&E Branch Offices	0	48,500	7,500	10%
Third Party & Community Outreach	101,100	Not Available	8,000	11%
Call Center Support	129,600	180,000	8,000	11%
Data Sharing	0	2,500	2,500	3%
Collateral Support	231,236	950,000	500	1%
Direct Marketing	40,000	200,000	6,000	8%
Special Initiatives	191,000	n/a	n/a	n/a
<b>TOTAL</b>	<b>\$1,240,563</b>		<b>20,316</b>	<b>100%</b>

- "Not Available" tactics reach a number of customers that is difficult to assess. These tactics are used to support increase customer awareness and drive customers to take action through a community organization or self-service option, such as the IVR or web application.
- Mass Marketing includes Television, phone, print, and, email blast. Enrollments numbers include IVR and internet enrollments generated from these efforts.
- Door-to-Door enrollment estimates include ESA Contractor outreach efforts

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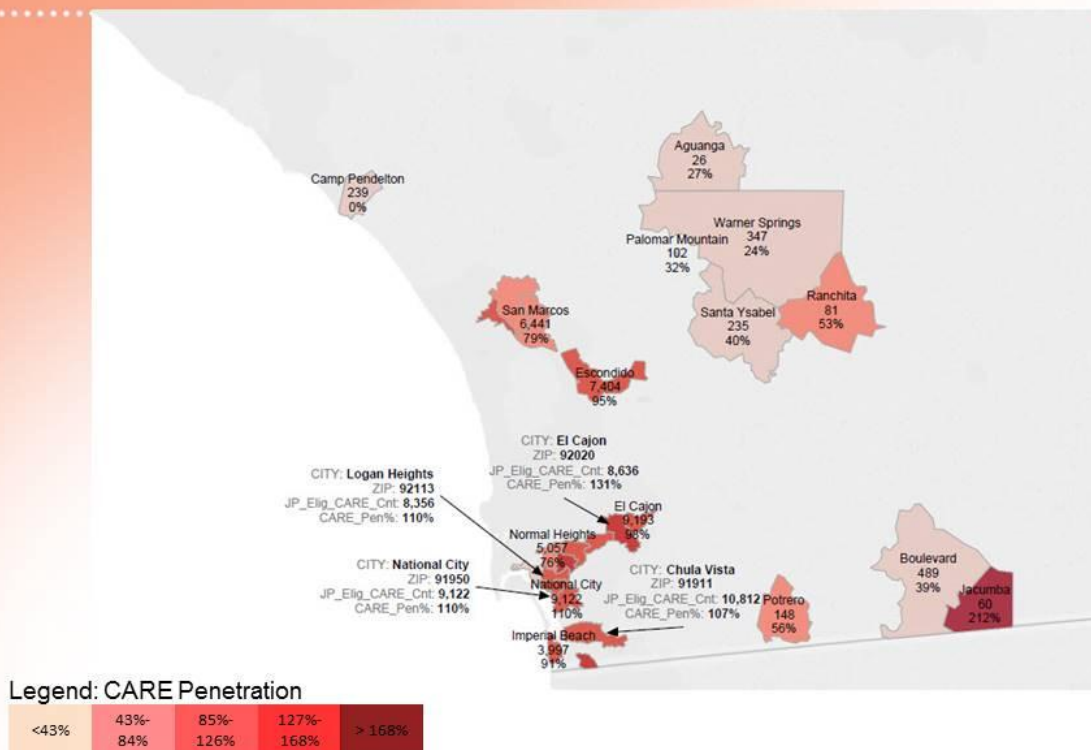
# CARE Marketing & Outreach

## 2015 Penetration Levels by Median Income

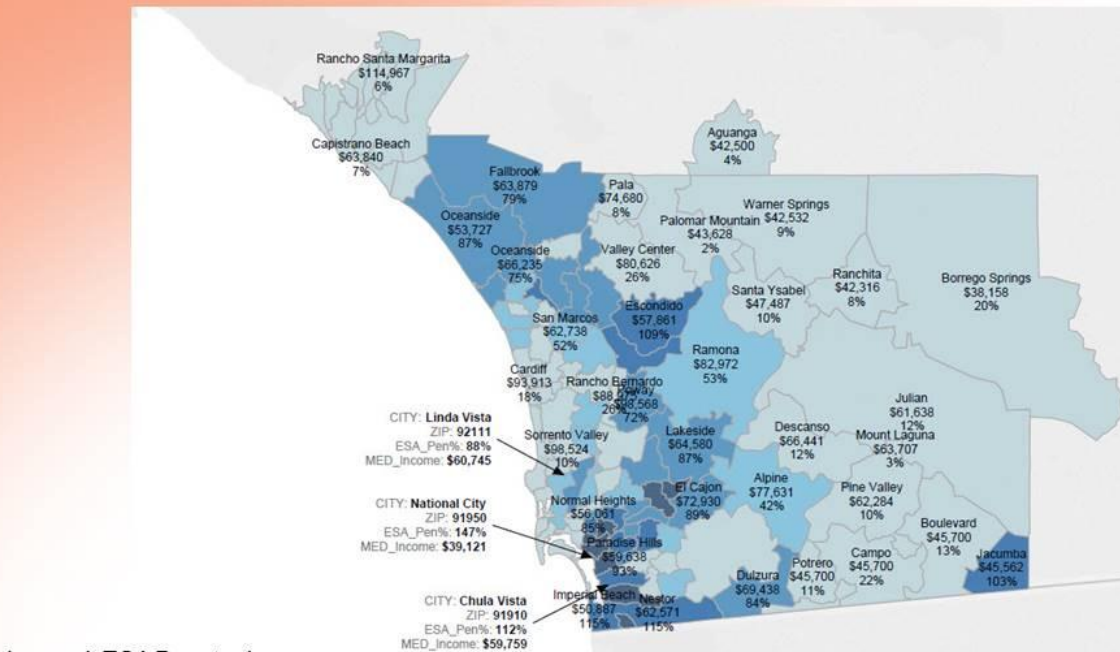


# CARE Marketing & Outreach

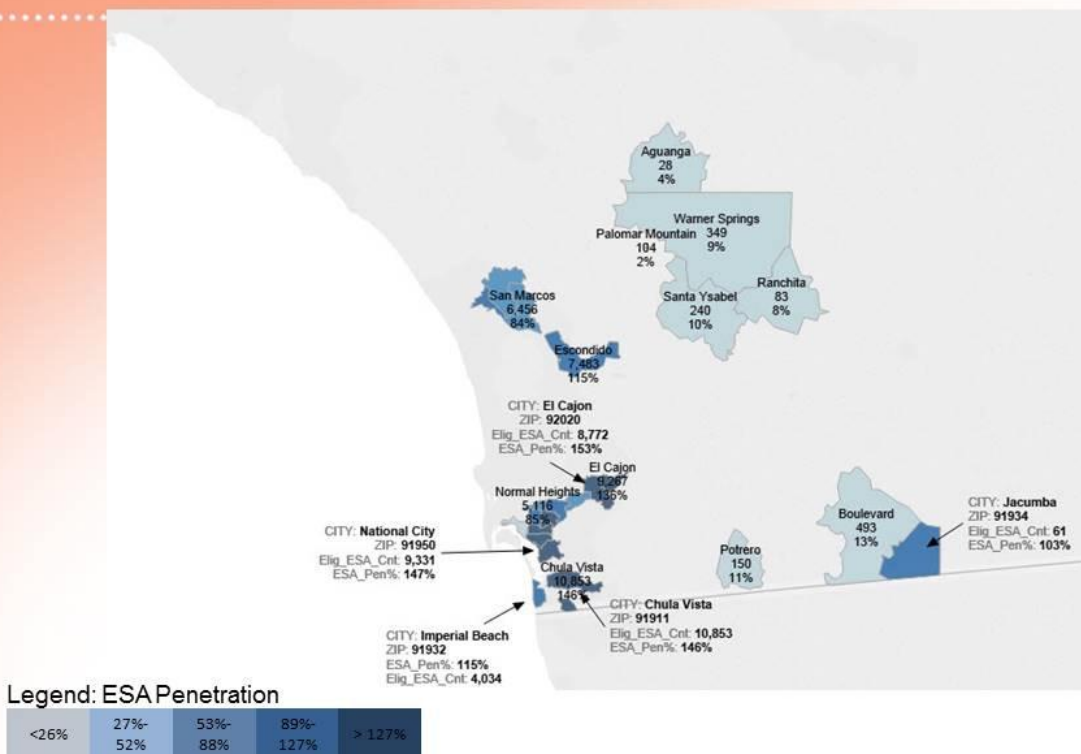
## 2015 Eligible Counts and Penetration – High Poverty Areas



## ESA Marketing & Outreach 2015 Penetration Levels by Median Income



## ESA Marketing & Outreach 2015 Eligible Counts and Penetration – High Poverty Areas



# SDG&E CARE Program

## CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	272,892	370,088	74%	\$2,535,330	46%	\$27,876,652
2014 Year-End	278,931	368,229	76%	\$4,530,706	82%	\$63,897,068
2013 Year-End	300,554	353,997	85%	\$3,453,771	63%	\$64,079,640

### Notes:

June 2015 CARE program data reported in SDG&E's Monthly Low Income Report submitted to CPUC July 21<sup>st</sup>.  
2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

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# SDG&E ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	2015 Goal	% of Goal	2015 YTD Expenditures	% of Authorized
2015 – June 30	6,400	20,316	32%	\$8,360,920	35%
2014 Year End	22,039	20,316	108%	\$19,143,282	71%
2013 Year End	17,568	20,316	86%	\$17,874,649	81%

### Notes:

June 2015 ESA Program data reported in SDG&E's Monthly Low Income Report submitted to CPUC July 21<sup>st</sup>.  
2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

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## SDG&E ESA Program

### Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$26,904,989	\$23,772,250	(\$3,132,739)	\$20,078,232	\$16,945,493

### Total Unspent Funds by Category through 2014

Category	Total Unspent	Unspent as Percent Of Authorized	
Measures <sup>1</sup>	\$14,972,305	10%	SDG&E calculated the unspent ESA Program funds from 2006 through 2014. Unspent funds are attributable to : 1) Timing of the Phase II low income decision which granted SDG&E's budget augmentation. Timing led to a delay in implementing some of SDG&E's program plans 2) Timing of the decision also caused SDG&E to limit go-backs 3) The measure mix provided to dwelling varied from SDG&E's forecast.
Marketing & Statewide Marketing	\$1,639,136	23%	
Regulatory Compliance	\$797,437	30%	
General Administration	\$2,268,265	16%	
CPUC Energy Division	\$208,675	63%	
Other <sup>2</sup>	\$192,415	14%	
Total	\$20,078,232	12%	

Notes:

<sup>1</sup> Includes In-Home Education and Customer Enrollment

<sup>2</sup> Other = Inspections, and Evaluations/Studies categories

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## SDG&E Contacts

CARE & ESA Program – Joy Yamagata  
 Regulatory Manager 858-654-1755  
 JYamagata@semprautilities.com

# PG&E ESA-CARE Program Update

**Low Income Oversight Board Meeting**  
**Large Utilities Workshop on CARE and ESA**  
Santa Ana, CA  
August 19, 2015



## Low Income Program Marketing Outreach

**Low Income Oversight Board Meeting**



## Process for selecting marketing campaigns



## How marketing defines hard-to-reach

Customers are more challenging to enroll due to barriers such as:

- Varying cultures
- Ethnicities
- Languages
- Disabilities
- Avoid charity
- Suspicious of the intent of assistance programs

PG&E Testimony Page 2-54—2-55

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## PG&E CARE – 2014 Marketing Outreach

### Background:

- Launched several multi-touch and multi-channel acquisition campaigns

### Target Audience:

- High propensity for eligibility and those who previously participated but did not recertify

### Results:

Channel	# of Total Enrollments	% of Total Enrollments
Direct Mail, Email, AVM	80,000	23%
Bill Inserts	26,000	8%
Digital Media	15,000	5%
Telemarketing	3,000	1%

Source: Program Annual Report, For Program Year 2014

### Sample Email Creative



Need help paying hot weather energy bills? [Download Pictures](#) View an English version

**Apply for the CARE Program to receive a monthly discount.**

[Apply Now >](#)

**We're here to help you save.**  
At Pacific Gas and Electric Company (PG&E), we understand that financial challenges can happen to anyone, at any time. The California Alternate Rates for Energy (CARE) Program is just one more way we can help you save. **Nearly 1.4 million customers already benefit from the CARE discount.** Apply today to begin receiving your monthly discount.

**CARE is simple and rewarding.**  
The CARE Program offers a significant monthly discount on PG&E bills for qualifying households, based on the total income of everyone living in the home. Once your application is approved, you'll begin receiving your monthly discount within two billing cycles.

**Getting started is easy.**  
You're likely to qualify for CARE. For specific details, requirements and program benefits, visit [pgae.com/care](#). Make sure to have your PG&E account number handy. Apply today by answering a few simple questions. No proof of income is necessary for enrollment.

[Apply Now >](#)

You can also help family, friends and neighbors who may qualify by telling them about the CARE Program. [Share the details >](#)

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To be removed from this email list, please click to [unsubscribe](#) to send an email to Pacific Gas and Electric Company.  
We respect your privacy. Please review our [privacy policy](#) for more information.  
\*PG&E refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. ©2014 Pacific Gas and Electric Company. All rights reserved. These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission. CCA-0714-2936

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## CARE – 2014 Community Engagement

### Background:

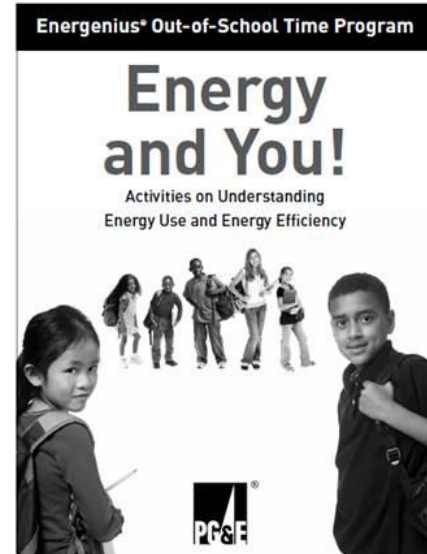
- Continued to support Community Outreach Contractors (COCs)
- Developed new partnership with Cal-SAC and modified Energenius Curriculum and Family Engagement packet

### Target Audience:

- Hard-to-Reach eligible populations who prefer in-language and acculturated in-person outreach
- Customers reaching out to Local Customer Service Offices to make payments and receive assistance

### Sample Results:

- 726 enrollments through COCs
- 10,524 enrollments through Local Customers Service Office



Source: Program Annual Report, For Program Year 2014

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## CARE – 2015 Community Engagement

### Background:

- Increased training and resources for Community Outreach Contractors (COCs)
- Develop Community Ambassador Program to have COCs help customers respond to Post-Enrollment Verification and High Usage communications
- Partner with community health outreach workers to reach Spanish speaking populations

### Target Audience:

- Hard-to-Reach eligible populations who prefer in-language and acculturated in-person outreach
- Customers utilizing Local Customer Service Offices on payments and assistance

### Sample Results:

- 566 enrollments through COCs
- 2,633 enrollments through Local Customers Service Offices

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## ESA – 2014 Marketing Outreach

### Background:

- Launched two multi-touch and multi-channel acquisition campaigns

### Target Audience:

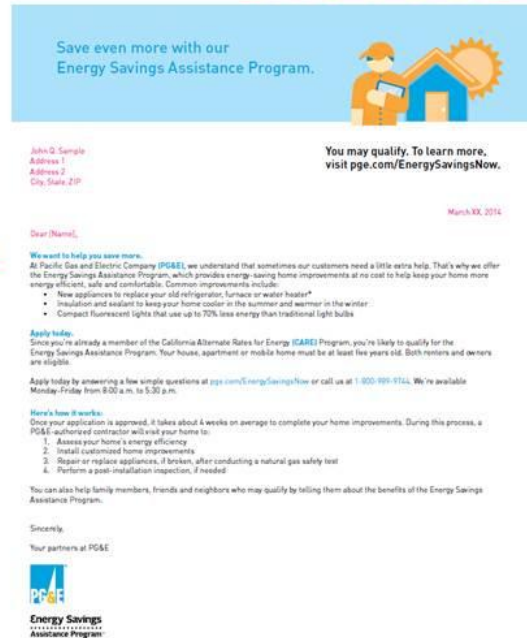
- Participating in the CARE Program
- Premise is at least five years old and has not been previously treated

### Sample Results:

- Direct mail, email, automated voice messages generated close to 15,000 treated homes - 13% of total treated homes

Source: Program Annual Report, For Program Year 2014

### Sample Direct Mail Creative



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## ESA – 2015 Marketing Outreach

### Background:

- Launched two multi-touch and multi-channel acquisition campaigns

### Target Audience:

- Participating in the CARE Program
- Premise is at least five years old and has not been previously treated

### Sample Results as of June 2015:

- Direct mail, email and automated voice messages has generated close to 6,000 applications
- Bill inserts has generated over 14,000 applications

### Sample Direct Mail Creative



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## ESA – 2015 Outreach Calendar

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Direct Mail												
Email												
AVM												
Bill Inserts												
Digital + Media												



## CARE & ESA – Budgets

CARE Program	2014 Authorized*	2014 Actual	2015 Authorized*	2015 Actual to Date (June)
Marketing and Outreach	\$7,246,455	\$6,183,947	\$7,246,455	\$2,910,738

CARE Outreach Category	% of Outreach Actual in 2014	% of Outreach Actual in 2015 (June)
Acquisition	85%	70%
Retention	15%	13%
Community Engagement	6%	17%

\* Includes \$1.4M retention outreach budget that was authorized under General Administrative budget category

ESA Program	2014 Authorized	2014 Actual	2015 Authorized	2015 Actual to Date (June)
Marketing and Outreach	\$1,943,151	\$1,788,107	\$1,943,151	\$595,343

ESA Outreach Category	% of Outreach Actual in 2014	% of Outreach Actual in 2015 (June)
Acquisition	100%	30%

Source: Program Annual Report, For Program Year 2014

# CARE and ESA Program Updates

## Low Income Oversight Board Meeting



## CARE and ESA Overview

### PG&E CARE Program

#### CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 -- June 30	1,405,613	1,635,673	86%	\$ 5,701,694	36%	\$ 248,053,955
2014 -- Year-End	1,413,334	1,648,774	86%	\$ 12,281,846	78%	\$ 607,206,765
2013 -- Year-End	1,386,070	1,574,844	88%	\$ 8,826,133	61%	\$ 703,432,080

### PG&E ESA Program

#### Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 -- June 30	51,209	119,940	43%	\$67,011,807	41%
2014 -- Year-End	123,539	119,940	103%	\$145,940,449	88%
2013 -- Year-End	123,566	119,940	103%	\$142,181,389	91%



# ESA Unspent Carryover Funds

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014 <sup>1</sup>	Total Projected Unspent Funds Through 2015
\$147,300,000	\$160,133,351	\$12,833,351	<b>\$95,759,757</b>	\$108,593,108

<sup>1</sup> Includes \$41.1M in electric funds from 2009-2011 that PG&E has requested in its 2015-2017 Application to be applied to the authorized 2016 revenue requirement.

## Total Unspent Funds by Category 2009 through December 2014

Category	Total Unspent	Unspent as Percent Of Authorized	Explanation <sup>4</sup>
Measures <sup>1</sup>	\$72,234,750	9%	Fund shifting rule restrictions between categories
PG&E Marketing & Statewide Marketing <sup>2</sup>	\$2,166,628	20%	Marketing efforts lower in previous years, increased contractor support to locate customers
Regulatory Compliance	\$630,424	31%	Amount varies per year depending on Regulatory needs and requests
General Administration	\$4,123,249	18%	Increased efficiencies led to lowered expenses
CPUC Energy Division	\$272,581	59%	Same amount budgeted annually, actual expenses based on Energy Division needs.
Other <sup>3</sup>	\$16,332,123	39%	NGAT inspection costs moved to GRC
<b>Total</b>	<b>\$95,759,757</b>	<b>11%</b>	

<sup>1</sup> Includes In-Home Education and Customer Enrollment

<sup>2</sup> Statewide Marketing has no unspent funds

<sup>3</sup> Includes Training, Inspections, and Evaluations/Studies

<sup>4</sup> Utilities must not overspend authorized budgets to avoid mid-cycle program shut down.

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# Unspent Funds

**PG&E would consider reallocating unspent carryover to the following areas:**

- 1. Measures (address removing measure caps)**
- 2. Water-Energy Nexus and Drought**
- 3. Pilots and General Administration**
  - Water Leveraging Initiative
  - MF Whole Building Initiative
  - HAN Pilot
  - Individualized Energy Education Follow-up using Customer Bill Information (Big Data Analytics)
  - Consumption-Driven Weatherization
- 4. Return balance to ratepayers**

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## ESA Enhancements

- **Remove Measure Caps**
  - PG&E is removing measure caps on CFLs and water measures to provide customers with all of the energy and water-savings measures they qualify to receive.
- **Add Measures to the 2016-2017 ESA Program**
  - PG&E will provide LEDs instead of CFLs to ESA participants.
  - PG&E will provide HE Furnaces to qualifying ESA customers.
  - PG&E is investigating additional water-savings measures.
- **Increase Water Emergency Activities and Measures**

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## Water and Drought Emergency Measures

**PG&E's ESA Program includes the following water measures:**

- Faucet aerators, pipe wrap, low flow showerheads, water heater blankets, thermostatic shower valves, hot water heaters

**New measures proposed in our 2015-17 Application:**

- HE Clothes Washers
- Water Education

**PG&E is investigating the following additional water measures, costs and coordination (ESA, rebates, water agencies):**

Toilet leak detection, toilet flappers, toilet tank water displacement/bags, shut-off hose nozzles, evaporative cooler leak devices, HE toilets, HE dishwashers, tub spout diverters

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## Energy-Water Leveraging Pilot

**Purpose:** Develop a strategic plan to integrate existing water conservation program offerings with ESA Program offerings to reduce the impact on California's severe drought.

**This blueprint for co-funded energy-water conservation program to serve ESA customers, includes:**

- Memorandum of Agreement between energy IOUs and water utilities
- Cost sharing model
- Expanded water conservation education and installed measures for low-income households
- Plan for weatherization contractors to provide service to customers with gas or electric only energy IOU service

**Key Activities currently completed or underway:**

- Examine existing water conservation programs
- Develop strategies to mitigate barriers to collaboration between energy IOU and water utility
- Engage stakeholders in design of test program
- Pilot test collaborative program with two water utilities

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## Energy-Water Leveraging Pilot

**PG&E is currently negotiating an agreement with two water agencies, and is discussing partnerships with eight others .**

**Through the Water Utility Partnerships, PG&E will:**

- Provide indoor and outdoor water audits and water education to low income customers as part of our ESA home assessment
- Provide an increased selection of hot and cold water saving measures to customers by leveraging ESA and water utility program funding
- Provide expanded water conservation measures for low-income households include rebates for HE Clothes washers and HE toilets.

**Increased funding will allow PG&E to add additional Water Utility Partners and additional measures.**

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## Proposed Multifamily Strategy

**Continues overall ESA Program strategy to offer free, direct-install measures to low income tenants while helping MF building owners understand all MF energy efficiency offerings available to them, including rebates and comprehensive whole building strategies.**

- Facilitates simplified enrollment process into all available PG&E programs
  - Multifamily Rebates
  - EUC Home Upgrade Program
  - MASH
  - Demand Response
    - Energy Alerts, rates
  - MyEnergy at pge.com
- Provides information on MF Building owner financing options, available Low Income Housing Tax Credit information, on-bill financing opportunities Multifamily Energy Efficiency Rebate Programs (MFEER) available to the customer
- One-stop shop approach provides invisible integration from customers' perspective
- Reduced customer touches through contractors' ability to offer multiple programs

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## 2015 MF Whole Building Project

**Purpose: To develop a coordinated approach to comprehensively treat MF buildings by incorporating offerings of ESA, MIDI, MFEER, EUC Home Upgrade Program and other programs using a Single Point of Contact (SPOC) to lead the building owner through the process.**

- ESA continues to offer services to tenants, but will also target building owners to explain ESA and MF offerings.
  - Targeting sources include: contractor-driven projects, MF housing organizations, buildings undergoing substantial retrofit, HUD and TCAC referrals, other MF property marketing and outreach.
- ESA-SPOC provides layered approach: ascertaining interest of building owner in free tenant-based ESA measures, prescriptive rebates available through MFEER and other EE programs, or comprehensive retrofit opportunities available through EUC Home Upgrade Program.
- One-stop shop approach helps building owner through applicable EE program processes, and coordinates ESA income verification and installations.

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# 2015 MF Whole Building Project

**The Coordinated ESA MF Project will weatherize 5 MF buildings using the coordinated energy efficiency approach**

- Planning and Development
  - Review MF and LINA recommendations and incorporate best practices
  - Prepare detailed catalogue of PG&E's current multifamily offerings, policies and procedures
  - Identify and address known barriers to MF participation (including split incentives, property owner waivers, income qualification, etc.
- Study Implementation and Evaluation
  - Develop contractor training, and MF building outreach and education materials
  - Weatherize 5 MF buildings
  - Implement coordination strategy with external agencies
  - Utilize ESA-SPOC project coordinator

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## Questions?



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# Appendix

## Low Income Oversight Board Meeting



## CARE – 2015 Saturation By County (1)

County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate	County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate
ALAMEDA	143,843	123,499	86%	KINGS	9,523	8,785	92%
ALPINE	143	11	8%	LAKE	16,286	12,152	75%
AMADOR	4,768	4,212	88%	LASSEN	172	187	109%
BUTTE	38,531	35,337	92%	MADERA	23,575	20,878	89%
CALAVERAS	7,983	5,463	68%	MARIN	18,745	12,272	65%
COLUSA	2,765	3,324	120%	MARIPOSA	3,542	2,304	65%
CONTRA COSTA	95,696	83,857	88%	MENDOCINO	16,022	10,220	64%
EL DORADO	15,963	11,134	70%	MERCED	39,849	39,346	99%
FRESNO	137,634	145,899	106%	MONTEREY	44,916	40,963	91%
GLENN	4,177	4,705	113%	NAPA	12,912	10,488	81%
HUMBOLDT	22,252	18,050	81%	NEVADA	11,430	9,012	79%
KERN	92,767	98,099	106%	PLACER	30,080	20,572	68%

Source: Program Monthly Report, For June 2015



## CARE – 2015 Saturation By County (2)

County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate	County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate
PLUMAS	3,745	1,719	46%	SIERRA	312	142	45%
SACRAMENTO	148,314	105,927	71%	SISKIYOU	21	8	38%
SAN BENITO	6,430	4,830	75%	SOLANO	41,925	40,963	98%
SAN BERNARDINO	397	297	75%	SONOMA	52,975	41,091	78%
SAN FRANCISCO	78,175	62,494	80%	STANISLAUS	62,728	50,871	81%
SAN JOAQUIN	87,372	87,973	101%	SUTTER	13,051	13,615	104%
SAN LUIS OBISPO	34,067	18,904	55%	TEHAMA	10,798	11,475	106%
SAN MATEO	48,507	34,711	72%	TRINITY	427	290	68%
SANTA BARBARA	20,066	17,010	85%	TULARE	9,190	9,250	101%
SANTA CLARA	124,730	105,115	84%	TUOLUMNE	9,780	7,113	73%
SANTA CRUZ	26,835	20,014	75%	YOLO	24,913	20,271	81%
SHASTA	26,682	19,462	73%	YUBA	10,657	11,299	106%

Source: Program Monthly Report, For June 2015

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## ESA – 2015 Saturation By County (1)

County	Estimated Eligible Households	Total Households Treated	County	Estimated Eligible Households	Total Households Treated
ALPINE	144	-	LAKE	16,448	347
AMADOR	4,819	221	LASSEN	172	2
BUTTE	40,116	934	MADERA	23,898	486
CALAVERAS	8,015	232	MARIN	21,427	56
COLUSA	2,822	194	MARIPOSA	3,628	16
CONTRA COSTA	105,634	3,648	MENDOCINO	16,302	242
EL DORADO	16,019	547	MERCED	41,051	1,567
FRESNO	144,236	6,267	MONTEREY	49,422	1,881
GLENN	4,255	264	NAPA	14,043	193
HUMBOLDT	23,163	462	NEVADA	11,650	291
KERN	94,983	3,327	PLACER	31,383	952

Source: Program Monthly Report, For June 2015

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## ESA – 2015 Saturation By County (2)

County	Estimated Eligible Households	Total Households Treated	County	Estimated Eligible Households	Total Households Treated
PLUMAS	3,752	23	SIERRA	315	-
SACRAMENTO	176,659	4,134	SISKIYOU	21	-
SAN BENITO	6,577	180	SOLANO	45,396	1,818
SAN BERNARDINO	397	18	SONOMA	56,247	1,412
SAN FRANCISCO	115,473	1,649	STANISLAUS	66,207	1,398
SAN JOAQUIN	93,519	3,567	SUTTER	14,436	344
SAN LUIS OBISPO	34,552	540	TEHAMA	10,912	415
SAN MATEO	57,706	583	TRINITY	434	8
SANTA BARBARA	20,498	619	TULARE	9,293	485
SANTA CLARA	149,163	3,736	TUOLUMNE	9,806	69
SANTA CRUZ	29,595	852	YOLO	28,347	404
SHASTA	27,592	902	YUBA	11,133	418

Source: Program Monthly Report, For June 2015

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## ESA – Market Barriers

### General CARE and ESA Barriers

Some of PG&E's customers have expressed that they are:

- Overwhelmed with financial troubles
- Unaware of the breadth of program benefits and valuable enough to pursue.
- Unclear about program eligibility and recertification criteria.
- Suspicious of motives and fear information will be shared

ESA Barriers to participation include\*:

- Not wanting contractors in the home,
- Not trusting the contractor or PG&E
- Needing to obtain landlord waivers to participate
- Withdrawing interest (not available for appointments or no longer interested)
- Unwilling to participate

\*Source: Low Income Needs Assessment

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## CARE & ESA – Ethnic Media

**PG&E has continued emphasis on overcoming language and cultural barriers through use of ethnic media.**

During 2014, PG&E has participated in:

- Media interviews with ten different ethnic radio and TV media outlets.
- Media event in Kern County, showcasing an ESA participant's home with coverage on KKEY-TV (Telemundo), Azteca Bakersfield, and El Popular Newspaper.
- Digital advertising with special focus on Spanish- and Chinese-speaking audiences
- Social media channels in Spanish on PG&E's Facebook page and in Chinese on PG&E's Twitter handle.
- Events with Hispanic and Chinese community, including the Autumn Moon Festival, Fiestas Patrias Celebration, Dragon Boat Festival, and Festival de Sol.

# *Center for Sustainable Energy*

*Overview of CSE's Program, Sachu Constantine, Director  
of Policy*

# Energy Upgrade California

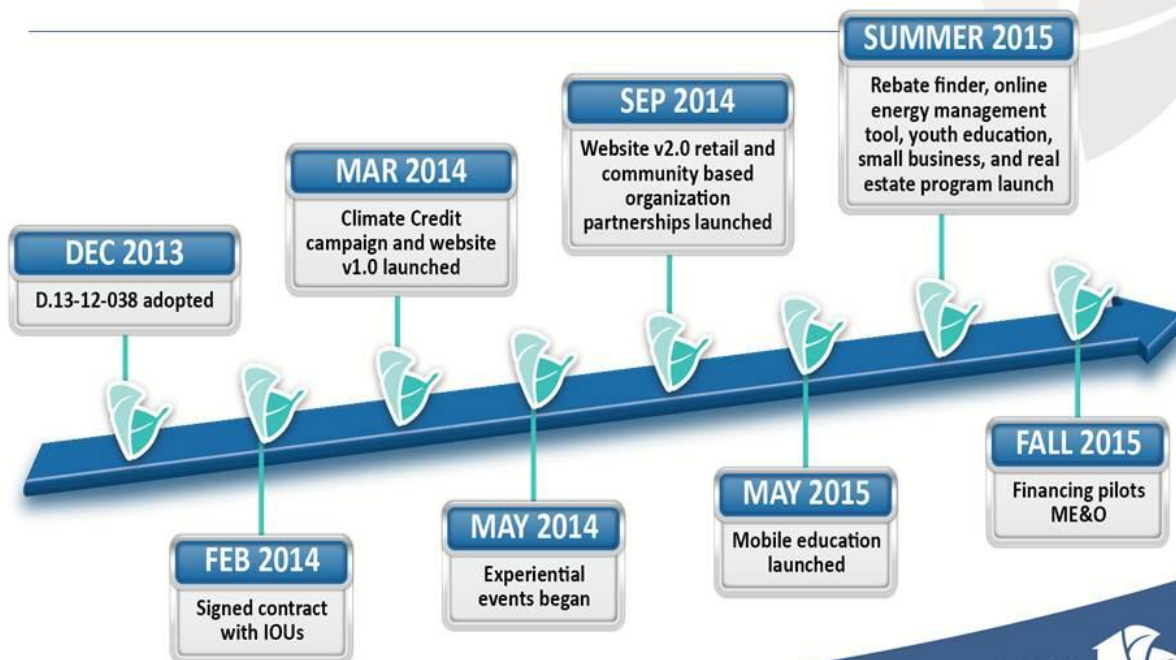
## Community Based Organization

### Channel Overview

Lauri Walker  
Manager, Energy Upgrade California  
Community Ambassadors  
Center for Sustainable Energy



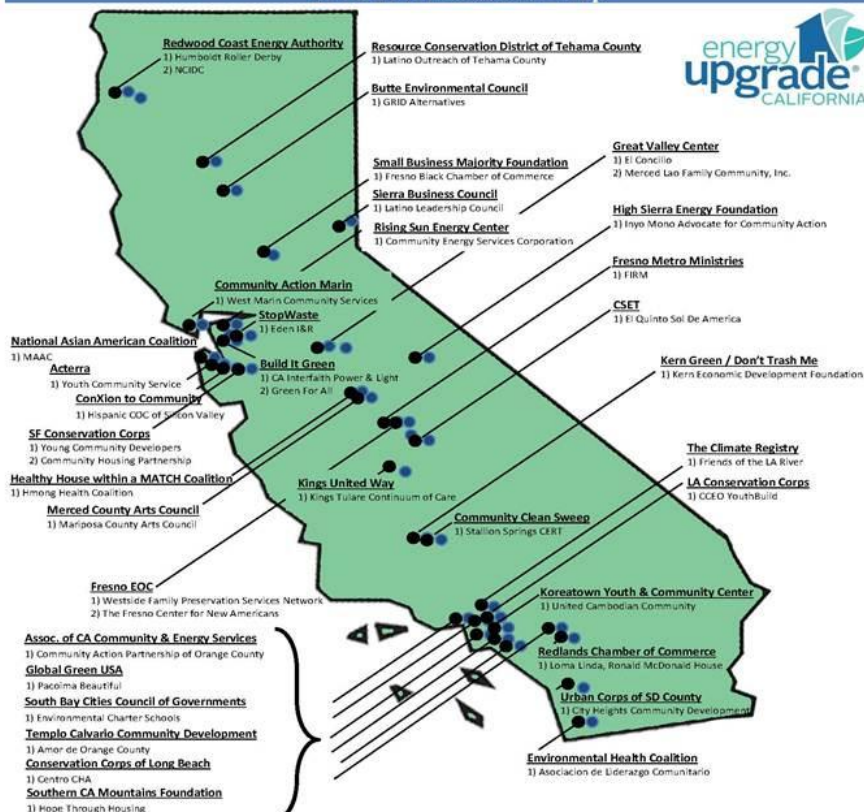
## Energy Upgrade CA Timeline



# Energy Upgrade California Branding



## Energy Upgrade California® Community Outreach Ambassador Program 2014-15 Ambassador Map



## Profile Breakdown

### Energy Upgrade CA CBOs

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#### 75 CBOs Statewide

- 83% - CBOs address the Low-moderate income
- 10% - CBOs address small business
- 6% - CBOs address environmental issues



## CBO Training and Grants

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- Initial comprehensive onboarding training
- Provide majority of grant funding upfront for direct implementation start up for CBOs
- Engagement training /Role Play in the area of energy efficiency
- Monthly Webinars: Upcoming campaigns/Best Practices
- Weekly Social tips and training
- Online training module
- Onsite training in targeted areas



## Energy Upgrade CA

### CBO Channel Highlights - Sept 2014 - July 2015

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- **19,195** – Number of Email Opt-ins for more information
- **481** events/presentation
- **55,399** Engagements

#### CBOs Social Media Metrics:

- **27,796** - Engagements (likes/shares/comments/favorites – Facebook and Twitter)
- **9,640** - Clicks to Energy Upgrade CA website



## Statewide ESAP CBO Proposal

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- Incorporate ESAP messaging into all statewide CBO outreach year round
- Need for additional CBOs to maintain the same level of engagement with Californians in 2016-2017
- Annual statewide ESAP Summit on outreach to:
  - Share Best Practices
  - Address Barriers
  - Lessons Learned



## CSE Experience with Low Income Programs

- MASH – Multifamily Affordable Solar Housing
- GETUP Training Program
- CVRP –Clean Vehicle Rebate Program
- San Diego Home Energy Upgrade
- Santa Ana Watershed Authority - Water-Energy Community Action Network (WECAN)



## Thank you!



## Contact Information

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**Lauri Walker**  
**Manager, Energy Upgrade California**  
**Community Ambassadors**

**[Lauri.walker@energycenter.org](mailto:Lauri.walker@energycenter.org)**

**(858)429-5138**



*Legislative Update*  
*CPUC - Office of Governmental*  
*Affairs*

# SUMMARY OF LOW INCOME RELATED BILLS

Bill / Author	TOPIC	Proposed Change to Existing Law
AB 88  GOMEZ	Sales and use taxes: exemption: energy or water efficient home appliances	Would, until January 1, 2021, exempt from sales and use taxes the gross receipts from the sale of, and the storage, use, or other consumption in this state of, an energy or water efficient home appliance purchased by a public utility that is provided at no cost to a low-income participant in a federal, state, or ratepayer-funded energy efficiency program for use by that low-income participant in the energy efficiency program.
AB 401  DODD	Low-Income Water Rate Assistance Program	Would require the Department of Community Services and Development, no later than January 1, 2017, in collaboration with relevant stakeholders, to develop a plan for the funding and implementation of the Low-Income Water Rate Assistance Program.
AB 682  WILLIAMS	Mobilehome park: electric and gas service: master-meter customers	Would authorize a person, without filing an application for an alteration or conversion with the department, to alter or convert, or cause to be altered or converted, the structural, fire safety, plumbing, heat-producing, or electrical systems and installations or equipment of a manufactured home or mobilehome in order to extend a gas line or electrical feeder line, or both, from a utility-owned service line to the electrical subpanel or gas inlet of the manufactured home or mobilehome only for the purpose of a natural gas or electric service utility upgrade, or both, within a mobilehome park.
AB 693  EGGMAN	Multifamily Affordable Housing Renewables Program	Would require the commission to annually authorize the allocation of \$100,000,000, beginning with the fiscal year commencing July 1, 2016, and ending with the fiscal year ending June 30, 2026, from the greenhouse gas allowance revenues received by electrical corporations set aside for clean energy and energy efficiency projects for the Multifamily Affordable Housing Renewables Program, which the bill would create.
AB 793  QUIRK	Energy efficiency	Would require weatherization programs to include energy management technology.
AB 802  WILLIAMS	Public utilities: energy efficiency savings	Would require the PUC to authorize electrical corporations and gas corporations to count all energy savings achieved toward overall energy efficiency goals or targets established by the PUC. The bill would authorize the PUC to adjust the energy efficiency goals or targets of electrical corporations and gas corporations to reflect the energy savings achieved in meeting or exceeding energy efficiency requirements in existing buildings.
AB 1262  WOOD	Telecommunications: universal service: California Advanced Services Fund	Would require that of the moneys collected for CASF on and after January 1, 2011, \$15,000,000 is to be deposited into the Rural and Urban Regional Broadband Consortia Grant Account and used for specified purposes, and \$10,000,000 is to be deposited into the Broadband Infrastructure Revolving Loan Account.

# SUMMARY OF LOW INCOME RELATED BILLS

Bill / Author	TOPIC	Proposed Change to Existing Law
SB 7  WOLK	Housing: water meters: multiunit structures	Would, if a submeter is used to charge a tenant separately for water service, impose requirements on landlords relating to submetered water service to individual dwelling units.
SB 350  DE LEON	Clean Energy and Pollution Reduction Act of 2015	Would require the California Public Utilities Commission and California Energy Commission to take into account benefits to disadvantaged communities and to review technology incentive programs to better align clean energy goals and help disadvantaged communities, among other major changes.
SB 681  HILL	Corporation taxes: deduction: public utilities	Would not allow a deduction under the Corporation Tax Law for expenses or expenditures by Pacific Gas and Electric Company that the Public Utilities Commission identified in its San Bruno penalty proceeding, thus assuring millions more in taxpayer funds for low-income programmatic spending.

***Public Comment***

## *Energy Division Reports and Updates*

- a) Highlights of Upcoming Activities for Low-Income Energy Programs*
- b) Update on the Low Income Needs Assessment*



# ***Energy Division Low Income Program Highlights & Upcoming Activities***

**LIOB MEETING  
AUGUST 19, 2015  
SANTA ANA, CALIFORNIA**



## **IOU and SMJU Consolidated Application Anticipated Proceeding Schedules**

ACTIVITY	IOU (A.14-11-007)	SMJU (A.15-02-001)
Proposed Decision	September 2015	October 2015
Comments on Proposed Decision	October 2015	November 2015
Replies to Comments on Proposed Decision	October 2015	November 2015
Final Decision	November 2015	December 2015





# 2016 LIOB LINA Update

Joanna Gubman

Supervisor – EE Residential / Low Income Programs

California Public Utilities Commission

August 19, 2015





## Current Status of 2016 LINA

- The 2016 LINA RFP went out on Wednesday, July 22<sup>nd</sup>
- Bids were due Tuesday, August 18<sup>th</sup>
- Contractor expected to be selected end of September.
- Once contractor is selected and contract is in place, ED staff will begin coordinating with LIOB and the IOUs on refinement of the SOW (see next slide)

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## ED / LIOB 2016 LINA Engagement

ED Staff met with LIOB members Robert Castaneda and Ortensia Lopez on June 23<sup>rd</sup>.

Based on this discussion the following opportunities for participation from LIOB (Robert and Ortensia) on the 2016 LINA project were identified:

- 1. Ad hoc LINA updates and discussion during existing quarterly LIOB meetings**
  - Doesn't need to be a standing agenda item. Based on ED and LIOB monthly meeting discussions it will be determined when these updates would be useful to the larger LIOB.
- 2. Monthly conference calls between LIOB members and CPUC staff**
  - Allows direct line of communication between LIOB and ED reps. More informal setting may allow for more targeted discussion. The consultant will participate on these calls ad hoc as needed.
- 3. LIOB participation in scheduled stakeholder workshops**
  - To the extent possible LIOB reps will also participate in the larger stakeholder workshops which will be incorporated in the study work plan schedule.



# *Lifeline Telephone Program Update*

## *Anna Jew—Consumer Programs*

- a) Lifeline Proceeding Update*
- b) Update on Lifeline Direct Application Project*
- c) Tribal Lifeline Update*
  - 1. Allocation of Funds*
  - 2. Process for Carriers Offering Tribal Lifeline Program*

# California LifeLine Program Update

Presented by Communications Division



Low-Income Oversight Board

August 19, 2015

## Participation Stats

### ■ Current California LifeLine Wireless Providers:

1. Telscape Communications, Inc.
2. Budget PrePay, Inc.
3. Assurance Wireless
4. Boomerang Wireless, LLC
5. Nexus Communications
6. TAG Mobile, LLC
7. i-wireless, LLC
8. Air Voice Wireless, LLC
9. Total Call Mobile, Inc.
10. Telrite Corporation
11. Global Connections Inc. of America

## Participation Stats cont.

### ■ Recently approved Federal Lifeline wireless providers:

1. Sage Telecom (January 2015)

## Participation Stats cont.

### ■ Pending Wireless Providers (as of August 5, 2015)

California LifeLine	Federal Lifeline
1. TracFone Wireless, Inc.	1. TracFone Wireless, Inc.
2. Blue Jay Wireless, LLC	2. Blue Jay Wireless, LLC
3. Curatel, LLC	3. Curatel, LLC
4. TC Telephone, LLC	4. American Broadband
5. American Broadband	5. QLink
6. SelecTel, Inc.	
7. Mobile Net POSA, Inc.	
8. AmeriMex Communications Corp.	
9. Excess Telecom, Inc.	

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# Total Participants

(End of July 2015)

- California LifeLine and/or Federal Lifeline Participants = 2,227,180
  - California LifeLine Wireless Participants = 1,512,245
    - Telscape 309,800 Participants
    - Budget 429,219 Participants
    - Assurance 282,070 Participants
    - Boomerang 91,951 Participants
    - Nexus 12,441 Participants
    - Tag Mobile 62,489 Participants
    - i-Wireless 181,734 Participants
    - Total Call Mobile 55,102 Participants
    - AirVoice 51,676 Participants
    - Telrite 35,763 Participants
  - California LifeLine Wireline Participants = 712,693



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# Total Participants cont.

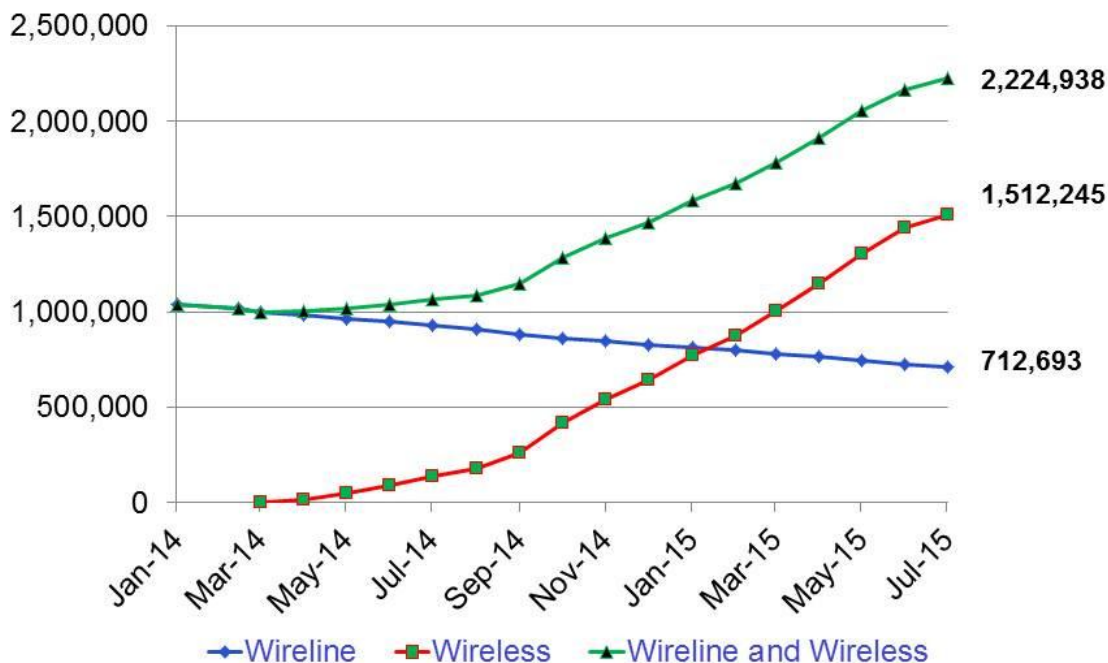
(End of July 2015)

- Federal-only Lifeline Wireless Participants = 2,242
  - Cricket 1,536 Participants
  - Nexus 499 Participants
  - Telscape 10 Participants
  - Virgin Mobile 197 Participants

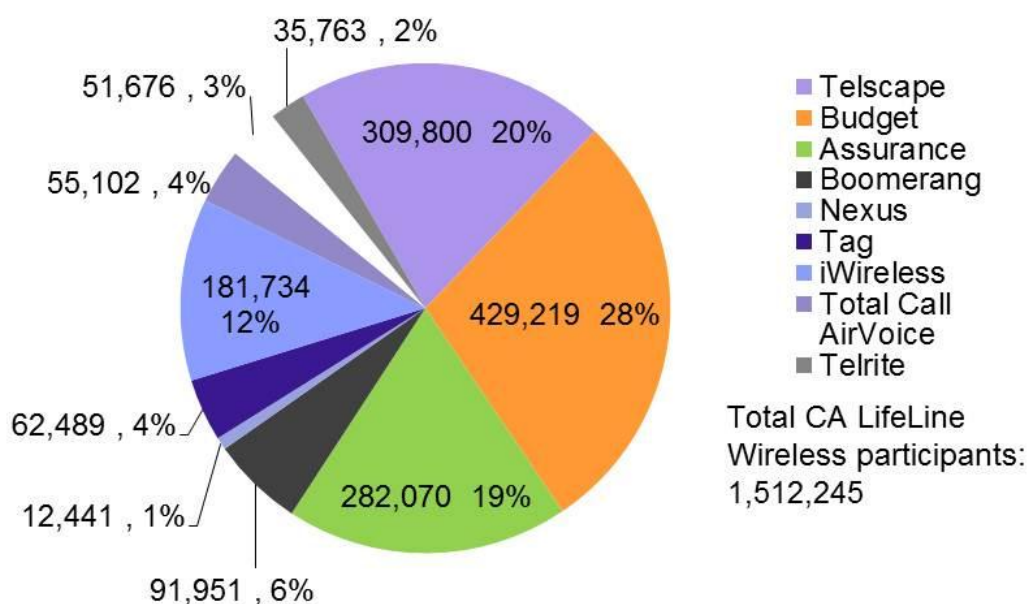


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# CA LifeLine Participants

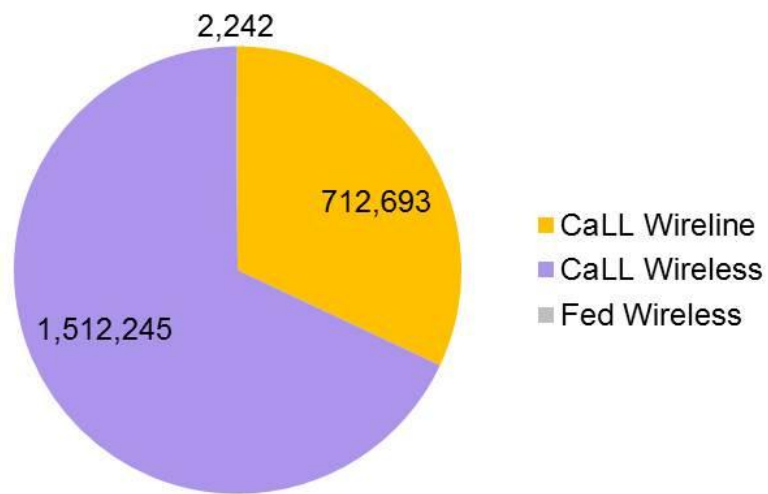


## CA LifeLine Wireless Participants (end of July 2015)



# CA LifeLine & Fed Lifeline Participants

(end of July 2015)



## CA LifeLine Participation Rate

(end of July 2015)

CA LifeLine	Approved Participants	Estimated Eligible Participants*	Participation Rate
Wireline	712,693	3,059,176	23%
Wireless	1,512,245	3,059,176	49%
Wireline + Wireless	2,224,938	3,059,176	73%

\* At or below 150% Federal Poverty Level, DOF provided based on the Census Data.

# Enhanced Lifeline

(End of July 2015)

CA LifeLine Carriers	Subscribers
1. Verizon	59
2. Ponderosa	28
3. Frontier Communications - of the Southwest	14
4. Frontier Communications – West Coast	12
5. Sierra Telephone	12
6. Siskiyou Telephone	7
7. AT&T	4
8. TDS Telecom - Winterhaven	2
Total	138



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## Enhanced Lifeline cont.

CA LifeLine Carriers	2011	2012	2013	2014	As of 7/31/15
1. Verizon	326	315	191	100	59
2. Ponderosa	34	38	34	25	28
3. Frontier – SW	460	432	116	35	14
4. Frontier – WC	82	89	91	27	12
5. Sierra Telephone	15	17	15	10	12
6. Siskiyou Telephone	11	14	14	14	7
7. AT&T	11	11	8	4	4
8. TDS – Winterhaven	20	15	11	4	2
9. Champion Broadband	1	1	1	0	0
10. Charter	0	1	1	1	0
11. Frontier (Citizens)	203	164	15	0	0
12. Siskiyou	11	14	14	14	7
13. Volcano	2	2	2	2	0
Total	1,176	1,113	513	236	138



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## Enhanced Lifeline cont.

Process for a carrier to provide Enhanced Lifeline wireless:

- ❑ File Tier II Advice Letter
- ❑ Include supporting documentation
  - Tribal Engagement
  - Proof of the response from the Tribes
- ❑ Shapefiles
  - Service areas
  - Cell Towers
- ❑ Identify how extra federal funds will be utilized
- ❑ Disclosures
  - Marketing Materials
  - Schedule Of Rates And Charges
  - Terms And Conditions

## Universal LifeLine Telephone Service Trust Administrative Committee

- Purpose (pursuant to Pub. Util. Code § 277(a))
  - ❑ To advise the Commission regarding the development, implementation, and administration of ULTS program.
    - To ensure lifeline service is available to the people.
    - To carry out program under the Commission's direction, control and approval.
- Meetings
  - ❑ Meet quarterly
    - Fiscal reports
    - 3rd Party Contract reports
    - Legal updates
    - Public Comments
    - Communications Division updates

# Universal LifeLine Telephone Service Trust Administrative Committee Cont.

## ■ Current Members

- |                          |                         |
|--------------------------|-------------------------|
| 1. Large ILEC:           | AT&T California         |
| 2. Small ILEC:           | Calaveras Telephone Co. |
| 3. Small ILEC Alternate: | Sebastian               |
| 4. CLEC:                 | Cox Communications      |
| 5. CLEC Alternate:       | Budget PrePay           |
| 6. Consumer (CHAIR):     | Consumer Action         |
| 7. ORA:                  | Staff from ORA          |



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## Contact Information

- Anna Jew – California LifeLine Implementation
  - [AML@cpuc.ca.gov](mailto:AML@cpuc.ca.gov); (415) 703-3087
- Consumer Affairs Branch
  - [http://www.cpuc.ca.gov/puc/cec/e\\_complaint/](http://www.cpuc.ca.gov/puc/cec/e_complaint/); (800) 649-7570
- CA LifeLine Administrator
  - <https://www.californialifeline.com/en>
  - (866) 272-0349 – English
  - (866) 272-0350 – Spanish
  - (866) 272-0351 – Lao/Hmong
  - (866) 272-0352 – Khmer
  - (866) 272-0353 – Tagalog
  - (866) 272-0354 – Korean
  - (866) 272-0355 – Vietnamese
  - (866) 272-0356 – Chinese
  - (866) 296-0860 – Japanese



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# *Water Utilities' Current Issues*

*Rami Kahlon, Director, Division of Water and Audits*



# Water Utilities Update Low-Income Oversight Board



**Division of Water and Audits**  
**Rami Kahlon, Director**

August 19, 2015



## Water Utilities

- Topics
  - Drought Update
  - Customer impacts
  - Participation Rates
  - Water Action Plan





## Drought Update

- April 1, 2015 – Governor Brown Executive Order
  - Calling for a 25% reduction in potable urban water use
- May 5, 2015 - State Water Resources Control Board
  - Emergency Regulation adopted
    - Targeted reductions for the top 411 water agencies
    - 4% to 36% reductions based on July – Sep 2014 reported figures
    - Base year 2013
    - Effective June 1, 2015
  - Requires Monthly Monitoring of Water Use
    - April 2015 – 13.5% reduction
    - May 2015 – 29% reduction
    - June 2015 – 27.3% reduction

3



## Drought Update

- May 7, 2015 - California Public Utilities Commission
  - Resolution W-5041
  - Orders compliance with State Board EO
  - Must file Schedule 14.1 to implement Mandatory Rationing
    - Class A and B utilities
- Reservoir Levels – August 2, 2015
  - Shasta – 43% (of capacity)
  - Oroville – 32% (of capacity)
  - Folsom – 28% (of capacity)



“Godzilla” El Nino may – or  
may not – materialize.

4





## Low-income Ratepayer Impacts

- Schedule 14.1 Mandatory Rationing
  - In place now for Class A and B utilities
  - Drought Surcharges for Low-income ratepayers
    - 50% reduction for over use
      - » Mostly automatic
      - » One case, customers may apply for
    - No distinction made
  - Appeal provisions



More protests / concerns are being expressed from higher users. But IOU customers are stepping up and meeting their water use reductions.

5



## Low-Income Programs

- All large (Class A) water utilities offer low-income bill assistance programs
- About 250,000 CPUC-regulated residential water customers participating in income water assistance programs
- Huge increase in participation rates in 2013
  - Auto enrollment program with data exchange between the energy and water utilities
  - March / September data runs



Low-income programs for water started in 2006.

6





## Low-Income Program Participation

Utility	Enrolled
California Water Service	95,289
Golden State	39,756
San Jose Water	20,982
California American	19,640
San Gabriel	41,127
Suburban	6,672
Park Water	12,264
Apple Valley Ranchos	3,864
Great Oaks Water	2,190
Total:	241,784



Program participation is leveling off

7



## Water Action Plan

- Assist Low Income Ratepayers
  1. Track service shut offs
    - Payment options
  2. Work with LIOB
  3. Develop Standardized Tariff Discounts
    - Rulemaking
  4. Increase Penetration Rates
  5. Enhance Website



Addressing low-income concerns has been a priority for the Commission.

8



# *New Assignments and Approval of the LIOB Subcommittee*

## *Subcommittee Reports and Updates*

- a) Marketing & Outreach (Board Members Toledo, Gross, Watts and Delgado-Olson)*
- b) ESAP Implementation (Board Members Castañeda, Wimbley, Watts and Lopez)*
- c) Workforce Education and Training (Board Members Hernandez and Castañeda)*
- d) Water Industry (Board Members Stephenson, Lopez and Castañeda)*
- e) Emerging Issues/Climate Change (Board Members Toledo and Delgado-Olson)*
- f) AB 327 (Board Members Hernandez, Lopez and Wimbley)*

## *Agenda Items for Future Meetings*